

## Application Form

Please read the Key Features document before completing this form. Please return your completed form to Foresters Friendly Society to proceed with your application

### FOR OFFICE USE ONLY

 Staff/FA/INT Name 

 Contact/FA/INT Number 

 Marketing Code 

### 1. Your details - applicant 1

Complete in BLOCK CAPITALS in black ink

 Title Mr  Mrs  Miss  Ms  Other 

 First name 

 Middle name(s) 

 Last name 

 Date of birth        

(You must be aged between 18 and 80 to apply)

 Address 


 Postcode 

 Home telephone 

 Mobile telephone 

 Email 

 If relevant, preferred branch no. 

### 2. Your details - applicant 2 (for joint life policies)

Complete in BLOCK CAPITALS in black ink

 Title Mr  Mrs  Miss  Ms  Other 

 First name 

 Middle name(s) 

 Last name 

 Date of birth        

(You must be aged between 18 and 80 to apply)

 Please tick this box if your address is the same as applicant 1

 Address 


 Postcode 

 Home telephone 

 Mobile telephone 

 Email 

### 4. Do you wish to set-up a regular withdrawal facility?

 For investments over £5,000 only. Yes  No 

If yes, please read the following notes and then answer the two remaining questions. You can only take regular withdrawals if the initial amount or amounts invested are above £5,000.

IF THE VALUE OF YOUR INVESTMENT BOND DROPS BELOW £5,000 YOUR REGULAR WITHDRAWAL WILL CEASE.

Alternatively, you can take out partial withdrawals whenever you want to subject to the rules outlined in the Key Features document. You do not need to inform us that you intend to make such partial withdrawals on this Application Form.

i) How much do you want to take out as a regular withdrawal?

 (Minimum individual payment £50) £ 

ii) How often do you want your regular withdrawal to be paid?

(subject to the above rules)

 Monthly  Quarterly  Half Yearly  Yearly  (Please tick)

### 3. How much do you want to invest in your Investment Bond?

Please tick one box only to inform us how much you want to invest

 £150,000  £100,000  £50,000  £25,000  £5,000 

 £1,000  Other (between £1,000 and £150,000). £ 

Please remember to enclose your cheque made payable to 'Foresters Friendly Society'.

### 5. How we will use your data

The information that you provide on this form will be held by Foresters Friendly Society and used to set up and administer the policy for which you are applying and for other business purposes. Further information about how we hold and use your personal information is available on our website ([www.forestersfriendlysociety.co.uk/privacy-policy](http://www.forestersfriendlysociety.co.uk/privacy-policy)).

Where an application is made via a Financial Adviser (FA), you agree your details being disclosed to that FA until you instruct us otherwise.

We (Foresters Friendly Society, including your Branch) would like to provide you with marketing communications about products, services and events which may be of interest to you by post, email and phone. By providing your details, you indicate your consent to receiving such communications from us. If you do not want to receive these communications, please tick the relevant box(es) below.

 I do NOT wish to receive these communications from you by:  Post  Email  Phone

We would also like to share your personal information with third parties who provide complimentary financial products and services to our own so that they can provide you with marketing communications about products and services which may be of interest to you by post, email and phone. By providing your details, you indicate your consent to receiving such communications from those third parties. If you do not want to receive these communications, please tick the relevant box(es) below.

 I do NOT wish to receive these communications from third parties by:  Post  Email  Phone

Please turn over to continue and complete your Application

## 6. Money Laundering Regulations

To comply with anti-money laundering requirements, we may verify your identity by carrying out an online check with a credit agency. If the policy is taken out on a joint basis, this applies to both policyholders. The agency will add a note to your reference file to show that an identity check has been made. We may pass information to third parties for the prevention of crime or detection of fraud or where required by law or regulation.

Money laundering checks will take place if you invest a lump sum of £10,000 or more, or your total investment with Foresters Friendly Society exceeds £10,000. Please complete this section if this applies to you.

Employment status:

(e.g. employed, self employed, unemployed etc)

The source of the single premium to be invested in this policy:

(e.g. inheritance, divorce settlement, property sale, etc.)

Previous address:

(if you have changed address in the last 3 months)

## 7. Declaration

**This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information.**

**I/We wish to apply for the Foresters Investment Bond.**

I/We have read and understood the Investment Bond Key Features. I/We declare that I am/we are UK residents (excluding Isle of Man and the Channel Islands) aged between 18 and 80 and that to the best of my/our knowledge and belief, the information given in this application is true and complete. I/We understand that the Investment Bond shall start when this application has been accepted by Foresters Friendly Society and the investment amount has been paid (subject to the money laundering requirements detailed above).

I/We understand that I/We will be entitled to Foresters Friendly Society surplus in the event of the closure of the Society only after having been a member for 5 years. I/We understand that a copy of the Rules and Memorandum are available upon request.

I confirm that I have not been given advice by Foresters Friendly Society in relation to the purchase of this Bond.

**For joint life policies both applicants must sign this form.**

Applicant 1:

Signature

Date

Applicant 2:

Signature

Date

**The annual statement and other correspondence will be sent to the address given by applicant 1.**

## How to get in touch

Write to:

Foresters Friendly Society  
 Foresters House  
 29/33 Shirley Road  
 Southampton, SO15 3EW

Tel: 0800 783 4162

Fax: 023 8022 9657

Visit: [www.forestersfriendlysociety.co.uk](http://www.forestersfriendlysociety.co.uk)

Information, including a copy of this Application Form, is available in large print, audio and Braille upon request.

Foresters Friendly Society is the trading name of The Ancient Order of Foresters Friendly Society Limited which is an Incorporated Friendly Society (Registration No. 511F) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Registration No. 110029).