

## Application Form

Please read the Key Features document before completing this form. Once you have decided which level of cover best suits your needs, please complete this Application Form and return it to Foresters Friendly Society.

### FOR OFFICE USE ONLY

Staff/FA/INT Name

Contact/FA/INT Number

Marketing Code

### 1. Your details

Complete in BLOCK CAPITALS in black ink

Title Mr  Mrs  Miss  Ms  Other

First name

Middle name(s)

Last name

Date of birth  D  D  M  M  Y  Y  Y  Y

Gender Male  Female

Address

Postcode

Home telephone

Mobile telephone

Email

If relevant, preferred branch number

### 2. Your monthly premium

Please refer to the attached rates table, which shows basic sums assured by age, and insert your required premium below.

Your monthly premium (minimum £10, maximum £100).

£100  £80  £50  £25  £10  other £

### 3. 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. 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.

### 4. 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 to 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

### 5. 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 proceeding. If you do not understand any point please ask for further information.**

**I wish to apply for the Foresters 50+ Life Cover policy:**

I have read and understood the 50+ Life Cover policy Key Features document which describes the benefits available and I understand that full cover commences after two years. I confirm that I am a UK resident (excluding Isle of Man and Channel Islands) and am aged between 50 and 80 years old. I declare that to the best of my knowledge and belief the statements provided on this Application Form are true and correct.

I understand that I 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 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 policy.

Signature

Date

**Please turn over to continue and complete your Application**

**6. Instruction to your Bank or Building Society to pay by Direct Debit (please do not detach)**

<p>To The Manager</p> <p>Name and full address of your Bank/Building Society branch</p> <div style="border: 1px solid #ccc; height: 60px; margin-bottom: 10px;"></div> <p>Name(s) of Account Holder(s)</p> <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 10px;"></div> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p>Sort Code <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> - <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> - <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/></p> <p>Account Number <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/></p> <p>Originator's Identification Number <span style="float: right;">9 1 5 6 4 9</span></p> <p>Reference Number (office use only) <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/></p> <p><b>Instruction to your Bank or Building Society</b></p> <p><small>Please pay Foresters Friendly Society Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Foresters Friendly Society and, if so, details will be passed electronically to my Bank/Building Society.</small></p> <p>Signature <input checked="" type="checkbox"/> <input style="width: 150px;" type="text"/> Date <input checked="" type="checkbox"/> <input style="width: 50px;" type="text"/></p> <p>Signature <input checked="" type="checkbox"/> <input style="width: 150px;" type="text"/> Date <input checked="" type="checkbox"/> <input style="width: 50px;" type="text"/></p> <p><small>Banks/Building Societies may decline to accept instructions to pay Direct Debits from some types of account, such as a savings account.</small></p>
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## Payment Nomination (optional)

Under the Friendly Societies Act 1974 you may wish to nominate any person to receive an amount not exceeding £5,000 of the sum payable at your death from the policy. If the value of the policy at that time is less than the amount you have bequeathed to be paid to your nominee, the value of the policy will be paid. The person nominated may not be an officer or employee of Foresters Friendly Society unless also a close relative. If you wish to take advantage of this facility please complete the nomination form below. If you marry after making this nomination then the nomination is annulled, and a new nomination should be made. If you wish to revoke the nomination at any time you should apply for the return of this form, and request another form if you wish to make a new nomination.

**Nominee**

<p>I hereby nominate:</p> <p>Title: <input style="width: 150px;" type="text"/></p> <p>First name: <input style="width: 150px;" type="text"/></p> <p>Last name: <input style="width: 150px;" type="text"/></p> <p>Of (nominee's address): <input style="width: 150px;" type="text"/></p> <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 10px;"></div> <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 10px;"></div> <p style="text-align: center;">Postcode</p> <p>Relationship to policyholder: <input style="width: 150px;" type="text"/></p> <p>to receive: £ <input style="width: 150px;" type="text"/></p> <p style="text-align: center;">(not exceeding £5,000) upon my death</p>	<p>Witnessed by*:</p> <p>Title: <input style="width: 150px;" type="text"/></p> <p>First name: <input style="width: 150px;" type="text"/></p> <p>Last name: <input style="width: 150px;" type="text"/></p> <p>Address: <input style="width: 150px;" type="text"/></p> <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 10px;"></div> <p style="text-align: center;">Postcode</p> <p>Signature: <input checked="" type="checkbox"/> <input style="width: 150px;" type="text"/></p> <p>Date: <input checked="" type="checkbox"/> <input style="width: 150px;" type="text"/></p> <p><small>* The witness must not be the nominee, the policyholder or a relation to the policyholder.</small></p>
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## Your Level of Cover

The table below shows the guaranteed sums assured that will be paid out after two years. If you die within the first two years of the policy, the cash sum pay out will be limited to returning the premiums you have paid, other than in the case of accidental death when the full sum assured will be paid. Your monthly premiums are invested in our Order Insurance with profits fund. Dependent on the fund's performance, bonuses may be added yearly to your policy to increase your sum assured, with the possible addition of a final bonus being paid on death. Bonuses will increase the cash sum your dependents will receive, however the addition of any bonus isn't guaranteed.

Simply find your age below and, based on your chosen monthly premium, see what basic sum assured you will obtain.

Guaranteed Sums Assured											
Age	Monthly premium										
	£10	£20	£25	£30	£40	£50	£60	£70	£80	£90	£100
50	2,196	5,613	7,321	8,786	11,714	14,643	17,571	20,500	23,428	26,357	29,286
51	2,112	5,397	7,039	8,447	11,263	14,078	16,894	19,710	22,525	25,341	28,157
52	2,029	5,185	6,763	8,116	10,821	13,526	16,231	18,937	21,642	24,347	27,052
53	1,948	4,979	6,494	7,793	10,391	12,989	15,587	18,184	20,782	23,380	25,978
54	1,869	4,777	6,232	7,478	9,970	12,463	14,956	17,448	19,941	22,433	24,926
55	1,793	4,581	5,976	7,171	9,561	11,951	14,342	16,732	19,122	21,512	23,903
56	1,718	4,389	5,725	6,870	9,160	11,450	13,741	16,031	18,321	20,611	22,901
57	1,645	4,203	5,482	6,578	8,771	10,963	13,156	15,349	17,541	19,734	21,927
58	1,573	4,020	5,243	6,292	8,389	10,487	12,584	14,681	16,779	18,876	20,973
59	1,503	3,842	5,012	6,014	8,019	10,023	12,028	14,033	16,037	18,042	20,046
60	1,435	3,667	4,783	5,740	7,653	9,566	11,479	13,393	15,306	17,219	19,132
61	1,368	3,496	4,560	5,472	7,296	9,120	10,944	12,768	14,592	16,416	18,240
62	1,303	3,329	4,342	5,210	6,947	8,684	10,421	12,158	13,894	15,631	17,368
63	1,239	3,167	4,131	4,957	6,609	8,262	9,914	11,567	13,219	14,871	16,524
64	1,177	3,009	3,924	4,709	6,279	7,849	9,418	10,988	12,558	14,127	15,697
65	1,117	2,855	3,723	4,468	5,957	7,447	8,936	10,425	11,915	13,404	14,893
66	1,058	2,705	3,528	4,234	5,645	7,056	8,468	9,879	11,290	12,702	14,113
67	1,002	2,560	3,339	4,006	5,342	6,677	8,013	9,348	10,684	12,019	13,355
68	946	2,419	3,155	3,786	5,048	6,310	7,572	8,834	10,096	11,358	12,620
69	893	2,282	2,976	3,572	4,762	5,953	7,144	8,334	9,525	10,715	11,906
70	841	2,149	2,803	3,364	4,485	5,607	6,728	7,849	8,971	10,092	11,213
71	791	2,020	2,635	3,162	4,217	5,271	6,325	7,379	8,433	9,487	10,541
72	742	1,895	2,472	2,967	3,955	4,944	5,933	6,922	7,911	8,900	9,889
73	694	1,774	2,314	2,776	3,702	4,627	5,552	6,478	7,403	8,329	9,254
74	648	1,655	2,159	2,591	3,454	4,318	5,182	6,045	6,909	7,773	8,636
75	602	1,540	2,008	2,410	3,213	4,017	4,820	5,623	6,426	7,230	8,033
76	558	1,426	1,861	2,233	2,977	3,721	4,465	5,210	5,954	6,698	7,442
77	515	1,315	1,715	2,059	2,745	3,431	4,117	4,803	5,489	6,176	6,862
78	472	1,205	1,572	1,886	2,515	3,144	3,773	4,401	5,030	5,659	6,288
79	429	1,096	1,429	1,715	2,286	2,858	3,430	4,001	4,573	5,144	5,716
80	386	985	1,285	1,542	2,056	2,570	3,085	3,599	4,113	4,627	5,141

A full illustration for your age and the premium you want to pay can be obtained from Foresters Friendly Society.

In the unlikely event that we could not honour the guarantee (i.e. If we were declared insolvent), you may be entitled to make a claim on the Financial Services Compensation Scheme.

## The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Foresters Friendly Society will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Foresters Friendly Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Foresters Friendly Society or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Foresters Friendly Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written notification may be required. Please also notify us.

## 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

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).

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