

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/IFA Name

Contact/IFA 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

Address

Postcode

Home telephone (including STD code)

Mobile telephone

Email

If relevant, preferred branch no.

(If you leave this blank, you will join our central members club)

2. How much do you want to invest in your Bond?

In order to start your Bond, please tick one box only to inform us how much you want to invest

£50,000 £25,000 £10,000 £5,000 £2,500

£1,000 Other (between £1,000 and £50,000). £

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

3. 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 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)

4. Data protection notice

The information that you provide on this form will be held by Foresters Friendly Society and used for general business purposes and, in particular, to set up and administer the policy for which you are applying. Where an application is made via an Independent Financial Adviser (IFA) you agree to your details being disclosed to that IFA until you instruct us otherwise. We may disclose your data in confidence to companies with which we have a business relationship. We and they may contact you to provide you with details of other products and/or services which may be of interest to you. This may be by post, email and phone. If you do not want your information to be used in this way, please tick this box.

5. Money laundering regulations

To comply with anti-money laundering requirements, we will 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 will not share the results of any electronic verification checks with any third parties and may request documentary evidence if required.

6. 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 wish to apply for the Foresters Bond.

I have read and understood the enclosed Bond Key Features. I declare that I am a UK resident (excluding Isle of Man and the Channel Islands) over 18 years old and that to the best of my knowledge and belief, the information given in this application is true and complete and shall form the basis of the contract between myself and Foresters Friendly Society. I understand that the 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 agree to the Bond terms and conditions.

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.

Signature

Date

How to get in touch

Write to:
Foresters Friendly Society
Foresters House
29/33 Shirley Road
Southampton SO15 3EW

Visit: www.forestersfriendlysociety.co.uk

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.

Authorised and regulated by the Financial Services Authority
Incorporated Friendly Society
No.511F. FSA Registration No.110029

Foresters Friendly Society is an incorporated branch society registered in the United Kingdom.