

Application Form

Please read the enclosed Key Features document before completing this form and then return it to us in the pre-paid envelope provided. Please ensure you retain the Key Features document. If you have any questions about completing this form please telephone us on 0800 783 4162.

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 YAddress Postcode Home telephone
(including STD code) Mobile telephone Email If relevant, preferred branch no.

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

Foresters Friendly Society is registered under the Data Protection Act 1998. We maintain records in regard to policy applications on computer and/or paper files. Information will only be disclosed to third parties in whatever format is considered appropriate by us. Where the application is received via an Independent Financial Advisor (IFA) you agree that any current or future information can be disclosed by Foresters Friendly Society to that IFA until such time as you notify us that such an agreement should cease. We may use your details to send you information on products and services we think you may be interested in. We may do this by post, email, and phone. If you do not wish your information to be used for marketing our products to you, 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.