

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. If the child has any Tax Exempt Savings Plans (excluding Junior ISAs or Child Trust Funds) with this or any other Friendly Society, the total amount that can be invested on their behalf can not exceed £25 per month.

FOR OFFICE USE ONLY

| | |
|--------------------|----------------------|
| Staff/IFA Name | <input type="text"/> |
| Contact/IFA Number | <input type="text"/> |
| Marketing Code | <input type="text"/> |

1. Child's details

This Child Tax Exempt Savings Plan is a gift to: (UK residents only)

Title Child's first name

Middle name(s)

Last name

Date of birth

Address (if different from yours)

Postcode

If relevant, preferred branch no.

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

2. Your details

This Child Tax Exempt Savings Plan is a gift from: (UK residents only)

Title Mr Mrs Miss Ms Other

First name Middle name

Last name

Date of birth

Address

Postcode

Home telephone (including STD code)

Email

Relationship to named child

3. Regular contributions (how long do you want to save?)

The contribution level required for this Plan is £25 per month (from £15 if you apply online).

For how long do you want to save?

EITHER: Until the child reaches a 'special birthday'. Please enter the child's birthday e.g. 18th. (Minimum 10 years from now).

OR: For a specified number of years. Please enter the number of years e.g. 10. (Max. 25 years, min. 10 years).

Note that in either case this cannot be before the child's 16th birthday.

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



To The Manager

Name and full address of your Bank/Building Society branch

Name(s) of Account Holder(s)

Sort Code - -

Account Number

Originator's Identification Number

Reference Number (office use only)

Instruction to your Bank or Building Society

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.

Signature X Date X

Signature X Date X

Banks/Building Societies may decline to accept instructions to pay Direct Debits from some types of account, such as a savings account.

Please turn over to continue and complete your Application

The Direct Debit Guarantee (please detach this Guarantee for your records)



- 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.

5. Parent/Guardian details (if not the person setting up the plan)

Title Mr Mrs Miss Ms Other

First name

Middle name(s)

Last name

Date of birth

Address

Postcode

Home telephone (including STD code)

Mobile telephone

Email

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.

Please carefully read the declaration below and sign it.

I have read and understood the Key Features document, and in applying for this plan, I declare that to the best of my knowledge and belief, the above statements are true and complete.

I confirm that the child does not currently hold a Friendly Society Tax Exempt Savings Plan with combined contributions (including that of this policy) in excess of £25 per month. I understand that all correspondence relating to the performance of the account will be sent to the child. I agree to the Child Tax Exempt Savings Plan terms and conditions.

I understand that the child 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.

In cases where you are not the child's Parent/Guardian: I confirm that the child's Parent/Guardian consents to me setting up this savings account.

Signature

Date

6. 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.

How to get in touch

Write to:

Foresters Friendly Society
Foresters House
29/33 Shirley Road
Southampton S015 3EW

Visit: 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.

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.