

Application Form

Please read the enclosed Key Features document before completing this form and returning it to us in the pre-paid envelope provided. Please ensure you retain the Key Features document. If you are not the parent or guardian of the child, you will also need to get them to sign the additional declaration in section 8. If the child has any Tax Exempt Plans with this or any other Friendly Society they will not be able to have a Foresters Child Tax Exempt Savings Plan, this is due to the £25 per month limit that can be invested on behalf of a child in all Friendly Society Tax Exempt Plans.

FOR OFFICE USE ONLY

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

2. Your details (if the payer)

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

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.

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

The contribution level required for this Plan is £25 per month.

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 Date

Signature Date

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 14 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.

