

## Top up Form (for existing policies only)

To make top ups into an existing Foresters Child Trust Fund please complete this form and return it to the freepost address shown below (no stamp required). Please ensure you sign the declaration on the reverse of this form.

**FREEPOST RLST-SJZE-BACC, Foresters Friendly Society, Foresters House, 29/33 Shirley Road, Southampton. SO15 3EW.**

### FOR OFFICE USE ONLY

Contact Number  Code   
 Staff Name

### 2. Your details

Title  Mr  Mrs  Miss  Ms  Other   
 First name  Middle name   
 Last name   
 Date of birth          
 Address   
  
 Postcode   
 Home telephone (including STD code)   
 Mobile telephone   
 Email   
 Relationship to the child

### 1. Child's details

Title  Child's first name   
 Middle name(s)   
 Last name   
 Date of birth          
 Address (if different from yours)   
  
 Postcode   
 Child Trust Fund Policy Number (if known)

### 3. Top ups

Top ups totalling £3,600 each year may be paid into the Child Trust Fund.

#### Option 1: Regular Contributions by Direct Debit.

How much would you like to pay each month?

Amount  £300  £100  £50  £25  Other £

Please specify between £300 and £5 per month, whole pounds only.

**Please remember to complete the Direct Debit Instruction in section 5.**

If there is an existing Direct Debit Instruction in place please tick to confirm if this instruction:

- replaces an existing direct debit or  
 is in addition to an existing direct debit.

#### Option 2: Lump Sum Contribution by Cheque

Minimum lump sum contribution is £50.

I enclose a cheque for £

Please make cheque payable to: 'Foresters Friendly Society'. Please write the child's name and date of birth on the back of the cheque and attach it to this form.

### 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 Limited 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 Limited 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.

## 5. 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.

## 6. 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 will not share the results of any electronic verification checks with any third parties and may request documentary evidence if required.

## 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.**

**If making top ups by Direct Debit:** I agree to the setting-up of the regular contributions to the child's Child Trust Fund of an amount indicated by myself in section 3. I authorise Foresters Friendly Society to start collecting these monthly payments on the 1st of every month.

I understand that all correspondence relating to the performance of the account will be sent to the child, care of the parent or guardian, and after the child's 16th birthday to the child him or herself. I understand that the details of my top ups will be disclosed to the parent or guardian.

I agree to the Child Trust Fund 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.

Signature

X

Date

X

### How to get in touch

#### Write to:

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

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

Tel: 0800 783 4162

Fax: 023 8022 9657

Information, including a copy of this 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.