

Application Form

Before applying for an Ethical Child Trust Fund please read the enclosed Key Features document and keep a copy for your records. Please sign the declaration in section 9 and if you are not the parent or guardian of the child they will also need to complete and sign sections 5 and 8. Please return the completed Application Form, **along with your Child Trust Fund voucher**, in the enclosed pre-paid envelope.

Remember: If you have family or friends who would like to make regular or one-off contributions as a gift to the child - please use the Additional Contributions Form enclosed. Further copies can be requested by calling 0800 783 4162 or by visiting www.forestersfriendlysociety.co.uk

1. Child's details

Complete in BLOCK CAPITALS in black ink

Title Child's first name

Middle name(s)

Last name

Date of birth

Address (if different from yours)

Postcode

Child's Unique Reference (URN as shown on voucher)

FOR OFFICE USE ONLY

Contact Number Code

Staff Name

2. Your details (Payer)

This Ethical Child Trust Fund 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)

Mobile telephone

Email

Relationship to named child

If relevant, preferred branch no.

3. Additional contributions

Additional contributions totalling £1,200 each year may be paid into the Ethical Child Trust Fund (in addition to the initial Government contribution).

Option 1: Regular Contributions by Direct Debit.

How much would you like to pay each month?

Amount £100 £50 £25 £15 Other £

Please specify between £100 and £5 per month, whole pounds only.

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 Application 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 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.

5. Parent/Guardian Details (if not the payer)

If the parent or guardian is not the person paying for the fund, please ask them to complete their details here and ask them to sign the declaration in section 8 (UK residents only).

Complete in BLOCK CAPITALS in black ink

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

6.  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. 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 the relevant box below.

Parent/Guardian

Payer

7. 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.

8. Parent/Guardian Declaration

(to be signed in all cases by the Parent/Guardian of the child)

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 declare that I am 16 years of age or over and have parental responsibility for the child. I will be the registered contact for the Ethical Child Trust Fund. I have read and understood the enclosed Key Features document.

I authorise Foresters Friendly Society to hold the Child's Inland Revenue contributions, subscriptions, Child Trust Fund investments, interest, dividends and any other rights or proceeds in respect of those investments and cash. I also authorise Foresters Friendly Society to make on the child's behalf any claims to relief from tax in respect of Child Trust Fund investments.

I agree to be bound by the Ethical Child Trust Fund terms and conditions contained in the Management Agreement and Policy. I will be given 30 days in which to change my mind.

I understand that after the child's 16th birthday all correspondence relating to the performance of the account will be sent to the child.

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.

I agree to the Ethical Child Trust Fund terms and conditions.

Signature of Parent/Guardian

Date

X

X

9. Payer Declaration

(to be signed in all cases by the person paying for this Plan)

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 Parent/Guardian is payer this must be signed as well as section 8

Please carefully read the declaration below and sign it.

In addition to the above declaration, if making additional contributions by Direct Debit, I agree to the setting-up of the regular contributions to the named child's Ethical Child Trust Fund account 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.

Signature of Payer

Date

X

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

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.