

## Application Form

Please read the enclosed Key Features document before completing this form and keep a copy for your records. Once you have decided to apply please complete this Application Form and return it to us in the pre-paid envelope provided. If you have any questions about completing this form please telephone us on 0800 783 4162.

### FOR OFFICE USE ONLY

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

### 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

Address

Postcode

Your National Insurance (NI) Number

We require your NI number to process your application. It can be found on a payslip, form P45 or P60.

Home telephone (including STD code)

Mobile telephone

Email

If relevant, preferred branch no.

### 2. How much money do you want to invest into your ISA?

#### A. Lump Sum Investments:

£10,200  £8,000  £5,000  £3,000  £1,000  £500

£250  Other £

(Minimum £250, maximum £10,200.)

Please remember to enclose your cheque made payable to "Foresters Friendly Society".

#### B. Monthly Contributions (please complete section 4):

£100 per month  £75 per month  £50 per month

£30 per month  Other £

(Minimum £30 per month, maximum £850 per month.)

### 3. Transfer Applications

I apply to transfer my existing ISA

Account Number

From (old provider)

To (new provider)

(and subscribe to this stocks and shares ISA for the tax year 20   and each subsequent year until further notice). Delete words in brackets if you will not be subscribing to this ISA.

### 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. 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.

## 6. 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.

## 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.**

I declare that:


- I apply to subscribe to a Foresters Friendly Society ISA for the current tax year and each subsequent year until further notice.
- All subscriptions made, and to be made, belong to me;
- I am resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Foresters Friendly Society if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- I have not subscribed and will not subscribe more than £10,200 in total to a cash ISA and a stocks and shares ISA in the same tax year.
- I have not subscribed and will not subscribe to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA.
- I agree to the ISA terms and conditions.

I authorise Foresters Friendly Society:

- to hold my cash subscription, other proceeds in respect of my ISA investments and any other cash; and
- to make on my behalf any claims to relief from tax in respect of ISA investments; and
- on my request to transfer or pay to me, as the case may be, interest, or other proceeds in respect of my ISA investments or any cash.

I declare that to the best of my knowledge and beliefs the statements provided in this Application Form are true and correct. I have read and understood the enclosed ISA Key Features. I understand that this application shall form the basis of the contract between me and Foresters Friendly Society.

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](http://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.