

ISA Top Up Form

Please use this form to apply to top up your Foresters Friendly Society ISA during the current financial year. Please ensure you have read the appropriate Key Features document before you top up your ISA.

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

Last name

ISA Policy No.

Date of birth D D M M Y Y Y Y

Address

Postcode

Home telephone (including STD code)

Mobile telephone

Email

2. How much do you want to top your ISA up with?

Lump sum and Monthly Contributions combined cannot exceed the maximum of £10,680 in any one financial year. A financial year starts on the 6th of April and ends on the following 5th of April. If you are uncertain about the maximum increase in contributions you can make for the rest of the financial year, please call us on 0800 783 4162.

A. Lump Sum Investments:

Amount: £

Minimum £250.

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

B. Increase in (or commencement of) Monthly Contributions (please complete section 4):

New Total Monthly Contribution: £

Please note that the minimum total monthly contribution is £30 and the minimum increase to existing contributions is £10 per month.

3. 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.

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 9 1 5 6 4 9

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

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. 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 increase my subscription to a Foresters Friendly Society ISA until further notice.
- All subscriptions made, and to be made, belong to me.
- I am a UK resident for tax purposes. If you are not a UK resident: I confirm I either perform duties which are treated as being performed in the UK, or I am married/in a civil partnership with a UK resident. I will inform Foresters Friendly Society if my circumstances change.
- I am 18 years of age or over.
- I declare that where I am increasing this ISA as a Stocks & Shares ISA, that I have not subscribed to another ISA of the same component type in this tax year.
- 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 ISA Key Features document 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

Tel: 0800 783 4162
Fax: 023 8022 9657

Information, including a copy of this Top Up 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.