

Application Form

Please read the Key Features document before completing this form. Please return your completed form to Foresters Friendly Society to proceed with your application. If you already have Tax Exempt Savings Plans (excluding ISAs) with this or any other Friendly Society, the total amount you can invest cannot exceed £25 per month.

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 <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	Date of birth	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y
First name	<input type="text"/>	Home telephone (including STD code)	<input type="text"/>
Middle name(s)	<input type="text"/>	Mobile telephone	<input type="text"/>
Last name	<input type="text"/>	Email	<input type="text"/>
Address	<input type="text"/>	If relevant, preferred branch no.	<input type="text"/>
<input type="text"/>		(If you leave this blank, you join our central members club)	
<input type="text"/>	Postcode		

2. Regular contributions

The amount you will be saving

To apply using this application form, the monthly contribution amount is £25.

Alternatively if you apply online, you can choose to save between £15 - £25 per month.

For how long do you want to save?

years

(maximum 25 years, minimum 10 years).

OR

The date that you want the plan to mature
(minimum 10 years from now).

3. 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 X Date X

Signature X Date X

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 10 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.

4. 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.

5. 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 wish to apply for the Foresters Tax Exempt Savings Plan.

I have read and understood the Tax Exempt Savings Plan Key Features. I confirm that I am a UK resident (excluding Isle of Man and Channel Islands) and I declare that to the best of my knowledge and belief the statements provided on this Application Form are true and correct. I agree to the Tax Exempt Savings Plan terms and conditions.

I declare that I do not have any other Tax Exempt Plans (excluding ISAs) with this or any other Friendly Society and that, by taking out this plan, my maximum entitlement of £25 per month to Friendly Society Tax Exempt Plans is not exceeded.

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

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.