

## Application Form

Please read and keep the Key Features document before completing this form and returning it to us. If you already have Tax Exempt 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  Mrs  Miss  Ms  Other

First name

Date of birth  D  D  M  M  Y  Y  Y  Y

Middle name(s)

Last name

Home telephone (including STD code)

Address

Mobile telephone

Email

If relevant, preferred branch no.

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

  


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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.

## 4. 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.

## 5. 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.

## 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 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	<input type="text"/>
Date	<input type="text"/>

## 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)

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.