

## 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 the child has any Tax Exempt Savings Plans (excluding Junior NISAs or Child Trust Funds) with this or any other Friendly Society, the total amount that can be invested on their behalf cannot exceed £25 per month.

### FOR OFFICE USE ONLY

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

### 1. Your details

This Child Tax Exempt Savings Plan is a gift from:

Title  Mr  Mrs  Miss  Ms  Other

First name  Middle name(s)

Last name

Date of birth

Address

Postcode

Home telephone

(including STD code)

Email

Relationship to named child

### 2. Child's details

This Child Tax Exempt Savings Plan is a gift for:

Title  Child's first name

Middle name(s)

Last name

Date of birth

Address (if different from yours)

Postcode

If relevant, preferred branch no.

### 3. Regular contributions (how long do you want to save?)

The contribution level required for this Plan is £25 per month (from £15 if you apply online).

**For how long do you want to save?**

**EITHER:** Until the child reaches a 'special birthday'. Please enter the child's birthday e.g. 18th. (Minimum 10 years from now).

**OR:** For a specified number of years. Please enter the number of years e.g. 10. (Max. 25 years, min. 10 years).

Note that in either case this cannot be before the child's 16th birthday.

### 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  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.

