

# Apply now to take care of your future

You've read about how the Investment Bond is a great way to invest a lump sum for the medium to long term. Why not apply now while it's fresh in your mind?

You'll find an application form attached. Simply fill in your details and return it to us by post using the freepost address below. There's no need for a stamp.

Alternatively you can apply online at [www.forestersfriendlysociety.co.uk](http://www.forestersfriendlysociety.co.uk)

## Send your completed application form to:

Foresters Friendly Society  
FREEPOST RLST-SJZE-BACC  
29-33 Shirley Road  
Southampton  
SO15 3EW

**Telephone: 0800 783 4162**

**Visit: [www.forestersfriendlysociety.co.uk](http://www.forestersfriendlysociety.co.uk)**

**Email: [memberservices@forestersfriendlysociety.co.uk](mailto:memberservices@forestersfriendlysociety.co.uk)**

## Application Form

Please read the Key Features before completing this form. Please return your completed form to Foresters Friendly Society to proceed with your application

### FOR OFFICE USE ONLY

Staff/FA/Int Name Contact/FA/Int Number Marketing Code 

### 1. Your details

Complete in BLOCK CAPITALS in black ink

Title Mr  Mrs  Miss  Ms  Other First name Middle name(s) Last name Address   
  
  
  
Postcode 

Date of birth

       Home telephone Mobile telephone Email If relevant, preferred branch no. 

The annual statement and other correspondence will be sent to the address given by applicant 1.

### 2. Your details - applicant 2 (for joint life policies)

Complete in BLOCK CAPITALS in black ink

Title Mr  Mrs  Miss  Ms  Other First name Middle name(s) Last name Address   
  
  
  
Postcode 

Date of birth

       Home telephone Mobile telephone Email

### 3. How much do you want to invest in your Investment Bond?

Please tick one box only to inform us how much you want to invest

£150,000     £100,000     £50,000   
£25,000     £5,000     £1,000

Other (between £1,000 and £150,000). £

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

### 4. Do you wish to set up a regular withdrawal facility?

For investments over £5,000 only. Yes  No

If yes, please read the following notes and then answer the two remaining questions. You can only take regular withdrawals if the initial amount or amounts invested are above £5,000.

IF THE VALUE OF YOUR INVESTMENT BOND DROPS BELOW £5,000 YOUR REGULAR WITHDRAWAL WILL CEASE.

Alternatively, you can take out partial withdrawals whenever you want to subject to the rules outlined in the Key Features. You do not need to inform us that you intend to make such partial withdrawals on this Application Form.

- i) How much do you want to take out as a regular withdrawal?  
(Minimum individual payment £50)    £
- ii) How often do you want your regular withdrawal to be paid?  
(subject to the above rules) (please tick)
- Monthly     Quarterly     Half Yearly     Yearly

### 5. How we will use your data

The information that you provide on this form will be held by Foresters Friendly Society and used to set up and administer the policy for which you are applying and for other business purposes. Further information about how we hold and use your personal information is available on our website ([www.forestersfriendlysociety.co.uk/privacy-policy](http://www.forestersfriendlysociety.co.uk/privacy-policy)).

Where an application is made via a Financial Adviser (FA), you agree to your details being disclosed to that FA until you instruct us otherwise.

We (Foresters Friendly Society, including your Branch) would like to provide you with marketing communications about products, services and events which may be of interest to you by post, email and phone. By providing your details, you indicate your consent to receiving such communications from us. If you do not want to receive these communications, please tick the relevant box(es) below:

I do NOT wish to receive these communications from you by:    post     email     phone

We would also like to share your personal information with third parties who provide complimentary financial products and services to our own so that they can provide you with marketing communications about products and services which may be of interest to you by post, email and phone. By providing your details, you indicate your consent to receiving such communications from those third parties. If you do not want to receive these communications, please tick the relevant box(es) below:

I do NOT wish to receive these communications from third parties by:    post     email     phone



## 6. 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. If the policy is taken out on a joint basis, this applies to both policyholders. The agency will add a note to your reference file to show that an identity check has been made. We may pass information to third parties for the prevention of crime or detection of fraud or where required by law or regulation.

Money laundering checks will take place if you invest a lump sum of £10,000 or more, or your total investment with Foresters Friendly Society exceeds £10,000. Please complete this section if this applies to you.

Employment status:

(e.g. employed, self employed, unemployed etc)

Previous address (if you have changed address in the last 3 months)

  
  
  
  

The source of the single premium to be invested in this policy (e.g. inheritance, divorce settlement, property sale, etc.)

## 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/We wish to apply for the Foresters Friendly Society Investment Bond.**

I/We have read and understood the Investment Bond Key Features. I/We declare that I am/we are UK residents (excluding Isle of Man and the Channel Islands) aged between 18 and 80 and that to the best of my/our knowledge and belief, all of the information given in this application is true and complete. I/We understand that the Investment Bond shall start when this application has been accepted by Foresters Friendly Society and the investment amount has been paid (subject to the money laundering requirements detailed above).

I/We understand that I/We 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/We understand that a copy of the Rules and Memorandum are available upon request.

**I confirm that I have not been given advice by Foresters Friendly Society in relation to the purchase of this plan.**

For joint life policies both applicants must sign this form.

**Applicant 1:**

Signature

Date

**Applicant 2:**

Signature

Date

The annual statement and other correspondence will be sent to the address given by applicant 1.