

Application Form

Please read the Key Information Document and Important Information section 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

Other (between £5,000 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?

Please read the following notes and then answer the two following questions.

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

You can take out partial withdrawals whenever you want to subject to the rules outlined in the Key Information Document and Important Information section.

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).

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 information about similar products and services which may be of interest to you. To consent to receive this, please select your preferred option(s) below:

Post Email Text Message (SMS) Phone

Foresters Friendly Society will not share your data with third parties for their marketing purposes.

You can update your preferences at any time by calling 0800 783 4162, emailing memberservices@forestersfriendlysociety.co.uk, completing the online form available at www.forestersfriendlysociety.co.uk/contactpreferences or writing to us at: Foresters Friendly Society, 29-33 Shirley Road, Southampton SO15 3EW.



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 Information Document and Important Information section. 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.

Apply now to take care of your future

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

Email: memberservices@forestersfriendlysociety.co.uk

Monday - Friday, 9am - 5pm (excluding Bank Holidays)

Information, including a copy of this document, 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 which is an Incorporated Friendly Society (Registration No. 511F) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Registration No. 110029).