

Inherited ISA Allowance Plan



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.

Please complete this form in BLOCK CAPITALS in black ink

FOR OFFICE USE ONLY

Staff/FA/Int Name

Contact/FA/Int Number

Marketing Code

1. Your details

Title Mr Mrs Miss Ms Other

First name

Middle name(s)

Last name

Address

Postcode

Date of birth

(You must be aged between 18 and 80 to apply. However, if you already hold a Foresters NISA, no maximum age limit will apply.)

Your National Insurance (NI) Number

We require your NI number to process your application. It can be found on a payslip, form P45 or P60.

Home telephone

Mobile telephone

Email

If relevant, preferred branch no.

2. The deceased's details

Title Mr Mrs Miss Ms Other

First name

Middle name(s)

Last name

Address

Postcode

Date of birth

Date of death

National Insurance (NI) Number

Date of marriage or civil partnership

3. Details of the deceased's NISA(s)

If your spouse or civil partner had more than one NISA, please list those for which you wish to use your inherited allowance with Foresters Friendly Society.

Name of NISA provider (if not Foresters Friendly Society)

Provider's address

NISA account no.

4. Details of the deceased's NISA(s) - to be completed by NISA provider

Name of NISA provider (if not Foresters Friendly Society)

Provider's address

Value at the date of death

Stamp

Signature

Date

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 information about products, services and events 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

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.

From time to time, carefully selected third parties that Foresters Friendly Society work with may like to contact you about products, services and events 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

As above, you can update your preferences at any time via the methods provided.



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 declare that:

- I apply to subscribe to a Foresters Friendly Society Inherited ISA Allowance Plan.
- The subscriptions made, and to be made, belong to me.
- I am between 18 and 80 years old. However, if you already hold a Foresters NISA, no maximum age limit will apply.
- I have not subscribed to another Inherited ISA Allowance Plan in respect of this specific NISA Allowance.
- I am the surviving spouse or civil partner of the deceased.
- I was living with the deceased with the meaning of the section 1011 of the Income tax Act 2007 at the date of the deceased's death.
- Any subscriptions I make will be under the provisions of regulations 5DDA of the NISA regulations.
- I will make any subscriptions within three years of the date of death, or if later, 180 days of the completion of the administration of the estate.

I declare that to the best of my knowledge and beliefs the statements and all of the information provided in this application form are true, complete and correct. I have read and understood the Key Information Document and Important Information section.

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 five years. I understand that a copy of the Rules and Memorandum are available on request.

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

Signature

Date

Apply now to invest after they've gone

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).