

Top up Form

(for existing policies only)

To make top ups into an existing Foresters Child Trust Fund please complete this form and return it to the freepost address shown below (no stamp required). Please ensure you sign the declaration on the reverse of this form. FREEPOST RLST-SJZE-BACC, Foresters Friendly Society, Foresters House, 29/33 Shirley Road, Southampton, SO15 3EW.

FOR OFFICE USE ONLY

Contact Number Code
 Staff Name

1. Child's details

Title Child's first name
 Middle name(s)
 Last name
 Date of birth
 Address (if different from yours)

 Postcode
 Child Trust Fund Policy Number (if known)

2. Your details

Title Mr Mrs Miss Ms Other
 First name Middle name
 Last name
 Date of birth
 Address

 Postcode
 Home telephone
 Mobile telephone
 Email
 Relationship to the child

3. Top ups

Top ups totalling £4,368 a year currently may be paid into the Child Trust Fund.

Option 1: Regular Top Ups by Direct Debit.

How much would you like to pay each month?

Amount £364 £200 £100 £50 Other £

Please specify between £364 and £5 per month, whole pounds only.

Please remember to complete the Direct Debit Instruction in section 4.

If there is an existing Direct Debit Instruction in place please tick to confirm if this instruction:

replaces an existing Direct Debit or
 is in addition to an existing Direct Debit.

Option 2: Lump Sum Top Ups by Cheque.

The minimum lump sum top up is £50, and the maximum is £4,368

I enclose a cheque for £

Please make the cheque payable to: 'Foresters Friendly Society'. Please write the child's name and date of birth on the back of the cheque and attach it to this form.

Alternatively, call us on 0800 783 4162 to make a top up from your debit card or to transfer a top up directly from your bank account.

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 top up form

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.

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 top up 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. 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.

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.

If making top ups by Direct Debit: I agree to the setting-up of the regular Direct Debit to the child's Child Trust Fund of an amount indicated by myself in section 3. I authorise Foresters Friendly Society to start collecting these monthly payments on the 1st of every month.

I understand that all correspondence relating to the performance of the account will be sent to the child, care of the parent or guardian, and after the child's 16th birthday to the child him or herself. I understand that the details of my top ups will be disclosed to the parent or guardian.

I have read and understood the Child Trust Fund Key Features document.

I understand that the child 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 upon request.

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

Signature

Date

How to get in touch

Write to:

Foresters Friendly Society
Foresters House
29/33 Shirley Road
Southampton, SO15 3EW

Tel: 0800 783 4162

Visit: www.forestersfriendlysociety.co.uk

Information, including a copy of this Top Up 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 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).