

# One Fund

# application form

Please complete this application and send it, together with details of those to be covered to National Friendly, 4-5 Worcester Road, Clifton, Bristol BS8 3JL.

## 1 Company details

Company name

Type of business

Address

Postcode

Daytime tel.

## 2 Registered address (if different from business address)

Registered address

Postcode

Daytime tel.

Companies House registration number (if applicable)

## 3 Main contact details

Name

Position

Direct line

Fax No.

Email

Intermediary name

## 4 How many individuals are covered under the plan?

Employees  Partners  Children

- On a separate spreadsheet please supply the title, first name, surname, sex, date of birth and address of all your employees covered on the plan in the format requested.
- We will also need to have the same information for any partners and children covered on the plan.
- If there are any children covered on the plan, they will share the annual benefit of an adult plan holder, therefore we will need to know the name of the adult whose benefits they will share.

## 5 Choice of cover

- Payments will be taken each month as agreed, and you will be covered from the date shown on your employees' plan documentation.

Please choose which level of premium cover you'd like:

**£10**
 **£12**
 **£14**
 **£16**
 **£18**
 **£20**

## 6 Data protection and confidentiality

National Friendly complies with the 1998 Data Protection Act, 1988 Access to Medical Reports Act and the 1990 Access to Health Records Act. We will treat the information you provide as confidential and hold it on computer, paper or any other appropriate form for as long as your application is being considered, the policy is in force and for an appropriate time after.

We may share this data with other relevant organisations so that we can set up and run your One Fund plan, validate claims and prevent fraud and money laundering. We will not disclose it unless it is lawful to do so. For the purposes of data protection law, National Friendly is the data controller. If you would like a copy of the personal data we hold, please write to the Compliance Department at National Friendly, 4-5 Worcester Road, Clifton, Bristol BS8 3JL. We may charge a small fee for providing this information.

## 7 Declaration

**'Your plan explained' is our terms and conditions upon which we intend to rely. For your own benefit and protection you should read them carefully before signing. If you do not understand any point please ask for further information.**

**As employer I would like to apply for a One Fund plan for my employee(s) (plus partners and children where applicable) and declare that:**

- I understand that National Friendly may use and disclose plan holder(s) information to provide their services, to administer the plan including underwriting, claims processing, assessment and analysis, to improve services and to protect National Friendly's interests.
- I understand that National Friendly may share customer information, including medical information, in strict confidence, with other persons who provide a relevant service to National Friendly, or act as agents.
- I will be responsible for making sure premiums are paid in full and for informing National Friendly of any change of details for those covered.
- I understand the importance of the section on data protection and confidentiality.
- I understand that National Friendly will contact a plan holder's GP and/or any medical treatment provider to process any claims he/she makes. We will seek the plan holder's consent to do so.
- I agree that to the best of my knowledge and belief the information provided is true and complete and I will let you know of any changes to this information, in writing.
- I confirm that if this application has been completed by someone else, it was done so at my request.
- I understand that if I fail to provide any relevant information National Friendly may cancel the plan.
- I understand that the One Fund plan will begin from the date shown on your employee's plan documentation.

Signature

X

Date

DD / MM / YY

Print name

Position in company

## 8 Instruction to your bank or building society to pay by direct debit

Please fill in the whole form using a ball point pen and send to:  
National Friendly, 4-5 Worcester Road, Clifton, Bristol BS8 3JL.

**Name and full postal address of your bank or building society.**

To: The Manager Bank/Building Society

Address

Postcode

Name(s) of account holder(s)

Bank/building society account number

Branch sort code

Service user number

6 9 8 0 3 1

Reference

FOR NATIONAL DEPOSIT FRIENDLY SOCIETY LTD OFFICIAL USE ONLY  
**This is not part of the instruction to your bank or building society**

**Instruction to your bank or building society**

Please pay National Deposit Friendly Society Ltd 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 National Deposit Friendly Society Ltd and, if so, details will be passed electronically to my bank/building society.

Signature(s)

X

Date

DDI7



Banks and building societies may not accept Direct Debit instructions for some types of account.  
This Guarantee should be detached and retained by the payer.

### The Direct Debit Guarantee

- 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 National Deposit Friendly Society Ltd will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request National Deposit Friendly Society Ltd 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 National Deposit Friendly Society Ltd 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 National Deposit Friendly Society Ltd asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

