

# Tax-Free Savings Plan application form

**You can use this application form to apply for a Tax-Free Savings Plan in the following ways:**

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## **In your own name:**

- A plan in your own name is available to UK residents aged 16-64. In this case you would be both the life assured and the plan holder (i.e. the owner of the plan and the person entitled to receive the money that has been invested).

## **In your partner's name:**

- You can take out a plan in your partner's name at any age, providing your partner is under the age of 65. In this case your partner would be the life assured and you would be the plan holder (i.e. the owner of the plan and the person entitled to receive the money that has been invested).

## **On behalf of a child:**

- Anyone over the age of 16 can save on behalf of a child under 16, but it must be the parent or guardian of the child who completes this application form.

In this case the child would be the life assured and the plan holder (i.e. the owner of the plan and the person entitled to receive the money that has been invested), however, the child's parent or guardian will act as the plan holder on the child's behalf up to age 16.

If the person paying the premium is not the life assured or the plan holder, that person will need to complete and sign the direct debit section. Please note, due to data protection legislation, they will not have access to information about the plan.

**Please complete this application form in BLOCK CAPITALS and either return it in the freepost envelope provided or send to: National Friendly, Freepost (SW 3073), Bristol BS8 3BR.**

**If you have any questions please don't hesitate to call us on:**

 **Call 0800 195 9245**

**(8am-6pm weekdays. Calls are recorded for quality purposes)**

# Tax-Free Savings Plan

## Application form

### 1 Life assured details

Title	Full name
Address	
Postcode	
Daytime Tel.	Email
Date of birth <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>
Marital status	

### 2 Plan holder details (if not the life assured) or parent/guardian details (if applying for a child under 16)

Title	Full name
Address (if different to life assured)	
Postcode	
Daytime Tel.	Email
Date of birth <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>
Relationship to life assured	

### 3 Your choice of term

You can choose a set term of between 10 and 45 years, but the plan must mature after the life assured's 16th birthday and before their 80th birthday. I would like the plan to run for  years.

### 4 Your choice of premium

Please tick whether you would like to pay monthly or annually by direct debit.

A monthly payment of £25.  An annual payment of £270.

#### 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

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

DDI17



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.



**5 Additional information**

As this savings plan includes life cover, we will need some information on the medical background of the **life assured**. Please include details of any regular medication, current medical treatment, or doctors' consultations in the last 5 years.

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We also need to know if the **plan holder** or a child under 16 holds any other friendly society tax-exempt policies. If they do, please provide details here of how much and how often they are currently saving.

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**6 Data protection and confidentiality**

National Friendly complies with the 1998 Data Protection Act. We will hold your information 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 will not disclose it unless it is lawful to do so. This information may be passed to other companies for reinsurance arrangements and money laundering & fraud prevention.

If you would like to request 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.

Please tick this box if you do not wish to receive information from National Friendly or its subsidiary companies on products and services that may be of interest to you.

**7 Declaration**

The 'Key Features' booklet and 'A guide to how we manage our with-profits fund' form the terms and conditions upon which we intend to rely. For your own benefit and protection you should read them carefully before signing this declaration. If you do not understand any point please ask for further information.

I would like to apply for a Tax-Free Saving Plan and declare that:

- I confirm that by taking out this policy the plan holder will not exceed his or her total tax-free limit of £25 a month or £270 a year, offered by friendly societies.
- I agree that to the best of my knowledge and belief the information provided in this application is true and complete and I will advise you, in writing, of any changes to this information.
- 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 disclose any relevant information, National Friendly may cancel the policy.
- I understand that my plan will begin when this application is accepted by you and the first premium has been paid.

**Life assured signature**

X

**Date**  /  /

**Plan holder signature (if not the life assured or if parent on behalf of a child)**

X

**Date**  /  /

**8 Campaign reference code**

If you have a campaign reference code please enter it here

**FOR IFA USE ONLY**

Company <input type="text"/>	Advised sale? YES <input type="checkbox"/> NO <input type="checkbox"/>	FSA Reference no. (FRN) <input type="text"/>	Individual reference no. (IRN) <input type="text"/>
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**For extra information on this product or to request  
a copy in Braille, large print or audio please call us on:**

**0800 195 9245**

(8am-6pm weekdays, calls are recorded for quality purposes)

**Email** [enquiries@nationalfriendly.co.uk](mailto:enquiries@nationalfriendly.co.uk)  
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National Friendly

Registered office: 4-5 Worcester Road, Clifton, Bristol BS8 3JL.

Tel: 0117 973 9003 Fax: 0117 980 9358 Email: [enquiries@nationalfriendly.co.uk](mailto:enquiries@nationalfriendly.co.uk)

National Friendly is the trading name of National Deposit Friendly Society Limited.

Incorporated and registered friendly society no. 369F.

Authorised and regulated by the Financial Services Authority. Registration no. 110008.

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

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INVESTOR IN PEOPLE