

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:

- An adult of any age 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	D	D	M	M	Y	Y	Male	<input type="checkbox"/>	Female	<input type="checkbox"/>
Marital status										

2 Plan holder details (if not the life assured)

Title	Full name									
Address (if different to life assured)										
					Postcode					
Daytime Tel.			Email							
Date of birth	D	D	M	M	Y	Y	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.

Name and full postal address of your bank or building society

To: The Manager	Bank/Building Society
Address	
Postcode	

Name of Account Holder(s)

Branch Sort Code

 - -

Bank/Building Society Account Number

Originator's Identification Number

Please provide your details if you are not the plan holder or life assured

Name
Address
Postcode
Date of birth
Relationship to life assured

Please pay National Friendly 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 Friendly and, if so, details will be passed electronically to my bank or building society.

Account Holder's Signature

Date

Account Holder's Signature

Date

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.

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.

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

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

- I have read the 'Key Features' booklet and 'A guide to how we manage our with-profits fund' and agree to the terms and conditions.
- 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

Date / /

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

Date / /

8 Campaign reference code

If you have a campaign reference code please enter it here

FOR IFA USE ONLY			
Company	Advised sale?	FSA Reference no. (FRN)	Individual reference no. (IRN)
<input type="text"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	<input type="text"/>	<input type="text"/>

**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



Registered office: 4-5 Worcester Road, Clifton, Bristol BS8 3JL.
Tel: 0117 973 9003 Fax: 0117 980 9358 Email: enquiries@nationalfriendly.co.uk

National Friendly is the trading name of National Deposit Friendly Society Limited.
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Authorised and regulated by the Financial Services Authority. Registration no. 110008.

www.nationalfriendly.co.uk

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