

# With-Profits Bond application form

**You can use this application form to apply for a With-Profits Bond in the following ways:**

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## **In your own name:**

- You can apply for a bond in your own name, providing you are a UK resident aged 16–79, regardless of your state of health. In this case your bond would be issued as a single life policy.

## **Jointly with one other individual:**

- You can apply for a bond with one other individual, providing you are both UK residents aged 16–79, regardless of your state of health. In this case your bond would be issued as a joint life policy and you can choose for life assurance to be payable in the event of either the first or second death.

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

- Anyone over the age of 16 can invest in a bond for a child under the age of 16. In this case the bond would be issued as a single life policy and the child would be the bond holder.

The child's parent or guardian will act on the child's behalf up to age 16. They will need to provide their details overleaf and sign the declaration.

If the person investing is not the parent or guardian, that person will also need to provide their details in the investor details section. Please note: if the person investing in the bond is not the named parent or guardian of the child, that person will only have access to initial investment information, and they will not be able to make any changes to the bond.

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

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**If you have any questions, please call us on**

**0800 195 9245**

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

# With-Profits Bond

## Application form

### 1 How would you like the bond issued?

Single life

Joint life payable on the first death

Joint life payable on the second death

### 2 Bond holder details

### Second bond holder details (for joint life only)

Title	First name(s)
Surname	
Address	
<input type="text"/>	
<input type="text"/>	
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"/>

Title	First name(s)
Surname	
Address	
<input type="text"/>	
<input type="text"/>	
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"/>

### 3 Details of child's parent or guardian (if applying on behalf of a child)

### Investor details

(if applying on behalf of a child and you are not the parent or guardian)

Title	First name(s)
Surname	
Address (if different to child)	
<input type="text"/>	
<input type="text"/>	
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"/>

Title	First name(s)
Surname	
Address (if different to child)	
<input type="text"/>	
<input type="text"/>	
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 child	

### 4 Amount you wish to invest

#### Please remember:

- If you don't currently hold a With-Profits Bond with National Friendly you can invest from £1,000 to £1 million, with a minimum of £1,000 in each separate bond.
- If you already have a With-Profits Bond with National Friendly additional bonds are available at a minimum of £500 each.

I wish to invest £  in  separate bond(s)

## 5 Your payment options

- **By cheque:** this can only be written by the bond holder(s), or investor on behalf of a child and should be payable to National Friendly. Please ensure that the name of the payee is on the cheque.
- **By debit card:** this can only be made by the bond holder(s), or investor on behalf of a child. Please enter your details below. If you pay by debit card we will need to contact you to get your 3 digit security number (the number on the back of your card). **Please do not put this number on the application form as it may present a security risk.**
- **Please note:** we cannot accept payments by credit card.

I wish to pay by

Please debit my account with the amount of £

Name (as appears on card)

Card number

Issue no.

Start date

Expiry date

Signature

Date

## 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 plan 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' forms the terms and conditions upon which National Friendly intend to rely. For your own benefit and protection, you should read it carefully before signing. If you do not understand any point, please ask for further information. I/we would like to apply for a With-Profits Bond and declare that:

- I/we agree that to the best of my/our knowledge and belief the information provided in this application is true and complete and I/we will advise you, in writing, of any change which affects this information.
- I/we confirm that if this application has been completed by someone else, it was done so at my/our request.
- I understand that if I/we fail to disclose any relevant information, National Friendly may cancel the policy.

Bond holder signature or parent/guardian on behalf of a child under 16

Date

Second bond holder signature (if applicable)

Date

Investor signature (if applicable)

Date

## For intermediary use only

Company

FSA reference no. (FRN)

Individual reference no. (IRN)

Advised sale?

YES

NO

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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.

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