

# Tax-Exempt Savings Plan Application form

Please return your completed application form in the pre-paid envelope provided or send it to:  
**National Friendly, 11-12 Queen Square, Bristol BS1 4NT**

Alternatively, you can complete your application online at [www.nationalfriendly.co.uk/tesp](http://www.nationalfriendly.co.uk/tesp)  
or by calling us on:

**0333 014 6244**

Calls from UK landlines and mobiles cost no more than a call to an 01 or 02 number and will count towards any inclusive minutes.

**8am-6pm weekdays. Calls are recorded for training and quality purposes.**

## 1 Policyholder details

Title	Full name
Address	
Postcode	
Contact tel.*	Email*

National Insurance no.\*   -   -   -   -

\*Leave blank for a child under 16

Date of birth

Male

Female

We will use the details provided above only to contact you about the policy and to verify your identity. We may also use them for marketing purposes unless you tell us not to (see Box 6). If less than 3 years at current address, please provide previous address on a separate sheet of paper.

## 2 Proposer details (to be completed by a parent or guardian where the policyholder is under 16)

Title	Full name
Address (if different from policyholder)	
Postcode	
Contact tel.	Email

Date of birth

Male

Female

Relationship to policyholder

We will use the details provided above only to contact you about the policy and to verify your identity. We may also use them for marketing purposes unless you tell us not to (see Box 6). If less than 3 years at current address, please provide previous address on a separate sheet of paper.

## 3 Name of payer (if different from policyholder and proposer)

Title	Full name
Address	
Postcode	
Contact tel.	Email

Date of birth

We will use the details provided above only to contact you about payments and to verify your identity. If less than 3 years at current address, please provide previous address on a separate sheet of paper.

## 4 Your choice of term

You can choose a set term of between 10 and 25 years and the policy must mature after the policyholder's 16th birthday.

I would like the policy to run for  years.

## 5 Additional information

We need to know if the policyholder holds any other friendly society tax-exempt policies or qualifying life assurance policies - see **What about tax?** in the Key Features. Please provide details here of how much and how often you are currently saving into these types of policies.

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### The Data Protection Act

National Friendly complies with the Data Protection Act 1998. We will treat the information you provide as confidential and hold it securely on computer, paper or in any other appropriate form for a reasonable period, including after considering your application and after closure of your policy.

### Use of your personal information

Information we receive in connection with the policy will be held by National Friendly in accordance with the Data Protection Act 1998. We will handle this information on a confidential basis and use it to administer the policy, validate and process claims, to prevent financial crime, and to maintain management information for business analysis. Where your data is shared with other organisations it will be subject to the data processing policies of those organisations. National Friendly will take reasonable precautions to protect the security of your data during transfer.

### How we share your data

Under this agreement we may share your personal information with our agents or service providers to administer the policy and with any intermediary or agent appointed to act on your behalf. We may share your data with government and law enforcement agencies to comply with legislation and regulations and to prevent financial crime and with fraud action groups for fraud prevention purposes. We will share your data with credit referencing agencies for identity verification which will leave a 'soft footprint' on your credit file but will not affect your credit rating. We will not otherwise share your personal information unless it is lawful to do so.

### Telephone calls

Calls are recorded for quality and training purposes.

### Obtaining a copy of your personal information

For the purposes of data protection law, National Friendly is the data controller. If you wish to view a copy of the personal information we hold about you, please write to the Data Protection Officer at: National Friendly, 11-12 Queen Square, Bristol BS1 4NT.

### Marketing consent

Where you have given your permission, National Friendly and its subsidiary companies may use the information you have provided to contact you by post, telephone or electronically with details of other products or services. You may contact us at any time to change your permissions, stop receiving this information, or to change the methods by which you receive it. Where you are the proposer, your marketing permission will not be deemed to be that of the child policyholder.

**We would like to let you know more about National Friendly and its subsidiary companies' products and services either by letter, telephone, email and text. However, if you would NOT like to receive marketing information about National Friendly or its subsidiary companies please tick here:**

**If you do not understand any point please ask us for further information before signing.**

**I would like to apply for a Tax-Exempt Savings Plan and declare that:**

- For the duration of this policy the policyholder will not pay premiums into any other friendly society tax-exempt savings policies.
- That in taking out this policy the policyholder is not in breach of the annual limit for qualifying policies of £3,600 at the date this application is made, and I will notify National Friendly if the policyholder does breach the annual limit.
- Where this application has been completed by someone else, it was done so at my request.
- I expect to be able to continue to pay premiums for the full duration of the term I have selected.
- Where I am the proposer, I will act on behalf of the child this policy is intended to benefit.
- I consent to my/our personal data being processed as described in Box 6 of this application form.
- I consent to my/our personal information being shared as described in the 'How we share your data' section of this application form.
- You may undertake a search with Experian for the purposes of verifying my identity. To do so Experian may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained.
- I have provided an official birth certificate as evidence of identity for any child policyholder named on this policy (this is the original document or official replacement as I understand photocopies will not be accepted).
- I understand that this policy will begin on the 1st of the month after the application has been accepted. This date will be confirmed in the policy schedule.
- I understand that the policy schedule and the terms and conditions document will form the basis of the contract for this policy. Both will be sent to me after this application has been accepted and I will then have 30 days in which I can change my mind if I wish.
- 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 understand that the statements I have made on this application will form the basis of the contract between me and National Friendly.

**Policyholder's signature (or proposer's signature if policyholder is aged under 16)**

X

Date

**Please ensure the payer completes the Direct Debit form on the next page, even if one is already set up with us.**



## 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**  
**11-12 Queen Square**  
**Bristol**  
**BS1 4NT**

Service user number

6 7 7 9 0 2

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

Name(s) of account holder(s)

Bank/building society account number

Branch sort code

Name and full postal address of your bank or building society

To: The Manager Bank/Building Society  
 Address  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Postcode

### 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)  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Date  
 \_\_\_\_\_

Reference

DD17

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.

**For information on this product or to request a copy in Braille, large print or audio please call us on:**

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**Or send us an email:**

**[info@nationalfriendly.co.uk](mailto:info@nationalfriendly.co.uk)**



National Friendly is a trading name of National Deposit Friendly Society Limited. Registered office: 11-12 Queen Square, Bristol BS1 4NT. Registered in England and Wales no. 369F. National Deposit Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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

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