

With-Profits Bond Application form

Please ensure you have read the Your Policy Explained document before completing an application. The Your Policy Explained document will be included in your information pack. If you would like a replacement copy, please visit our website or call us. Our contact details are below.

Once you have read the Your Policy Explained document, you can apply by:

- Completing an application online at www.nationalfriendly.co.uk/wpb
- Completing this application form and:
 - posting it in the pre-paid envelope provided
 - posting it to **National Friendly, 11-12 Queen Square, Bristol BS1 4NT**
 - scanning and emailing it to info@nationalfriendly.co.uk
- Completing an application over the phone 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.

With-Profits Bond Application form



- We will use the details provided below only to contact you about the policy and to verify your identity. For the first policyholder, second policyholder and proposer, we may also use these details for marketing purposes unless you tell us not to (see section 8).
- If you have lived less than three years at your current address, please provide your previous address on a separate sheet of paper.

1 First policyholder details

Title	Full name		
Address			
			Postcode
Contact tel.*		Email*	
Date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	Male <input checked="" type="checkbox"/>	Female <input checked="" type="checkbox"/>
Are you a resident for tax purposes anywhere other than the United Kingdom (UK)?*		Yes <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>
Please provide the following information about the countries where you are tax resident and your Taxpayer Identification Number (TIN): For the UK this will be your National Insurance (NI) number.*			
Country	United Kingdom	TIN (NI number)	
Country		TIN	

Please continue on a separate sheet of paper if you need more space.

* Please leave blank for a child under 16

2 Second policyholder details (for joint life policies only)

Title	Full name		
Address (if different from policyholder's address)			
			Postcode
Contact tel.		Email	
Date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	Male <input checked="" type="checkbox"/>	Female <input checked="" type="checkbox"/>
Are you a resident for tax purposes anywhere other than the United Kingdom (UK)?		Yes <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>
Please provide the following information about the countries where you are tax resident and your Taxpayer Identification Number (TIN): For the UK this will be your National Insurance (NI) number.			
Country	United Kingdom	TIN (NI number)	
Country		TIN	

Please continue on a separate sheet of paper if you need more space.

When do you want the death benefit to be payable? Please tick one option only.

- Payable on the death of the first policyholder
- Payable on the death of the second policyholder

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

Title Full name

Address (if different from policyholder's address)

Postcode

Contact tel. Email

Date of birth

Male Female

Relationship to policyholder

Are you a resident for tax purposes anywhere other than the United Kingdom (UK)? Yes No

Please provide the following information about the countries where you are tax resident and your Taxpayer Identification Number (TIN): For the UK this will be your National Insurance (NI) number.

Country United Kingdom TIN (NI number)

Country TIN

Please continue on a separate sheet of paper if you need more space.

4 Payer details (if different from policyholder and proposer)

Title Full name

Address

Postcode

Contact tel. Email

Date of birth

Male Female

Are you a resident for tax purposes anywhere other than the United Kingdom (UK)? Yes No

Please provide the following information about the countries where you are tax resident and your Taxpayer Identification Number (TIN): For the UK this will be your National Insurance (NI) number.

Country United Kingdom TIN (NI number)

Country TIN

Please continue on a separate sheet of paper if you need more space.

5 Amount you wish to invest

Please tell us how many policies you would like the investment separated into. Please continue on a separate sheet if necessary.

Please note: Minimum investment is £2,500 in each policy.

I would like to invest a total of £ as follows:

Policy 1: £

Policy 2: £

Policy 3: £

Policy 4: £

6 Your payment options

How would you like to pay? Please tick all that apply:

- By transferring a maturity value from an existing National Friendly savings policy.
If ticked, please complete the transfer form that is included in the application pack and proceed to section 7.
- One-off direct debit from an account in the payer's name.
If ticked, please complete the rest of section 6 onwards including the direct debit instruction in section 10.
- A cheque from an account in the payer's name.
If ticked, please complete the rest of section 6. Please enclose a cheque with this application made payable to National Friendly with the name of the policyholder(s) written on the back.

To comply with money laundering regulations we are required to ask the payer questions about employment, income and source of wealth.

The payer to answer the following:

1. What is your occupation? (If you are not working please indicate e.g., retired, student, etc.)

2. What is your current annual income?

£

3. How have you acquired or accumulated the money you are investing? Please tick all that apply.

- | | | | | | |
|------------------------|-------------------------------------|-----------------------|-------------------------------------|---------------------|-------------------------------------|
| Income from employment | <input checked="" type="checkbox"/> | Inheritance | <input checked="" type="checkbox"/> | House sale | <input checked="" type="checkbox"/> |
| Gift | <input checked="" type="checkbox"/> | Divorce settlement | <input checked="" type="checkbox"/> | Company sale | <input checked="" type="checkbox"/> |
| Regular savings | <input checked="" type="checkbox"/> | Policy claim/maturity | <input checked="" type="checkbox"/> | Sale of investments | <input checked="" type="checkbox"/> |
| Compensation payment | <input checked="" type="checkbox"/> | Lottery/gaming win | <input checked="" type="checkbox"/> | Other* | <input checked="" type="checkbox"/> |

*For 'Other', please provide details:

National Friendly reserves the right to ask further questions or request further documentary evidence of your source of wealth if necessary.

7 Regular partial withdrawals

This section is optional. If you do not want to make a regular partial withdrawal, please proceed to section 8.

The minimum withdrawal we allow is £500 per withdrawal. Please refer to the Your Policy Explained document for more information on regular partial withdrawals.

I would like the amount to be £ per withdrawal.

I would like the withdrawals to be paid on:

an annual basis

a six monthly basis

a quarterly basis

a monthly basis

I would like the withdrawals to be paid into the following account:

This must be a bank or building society account in the name of the policyholder(s).

Name(s) of account holder(s)

Branch sort code

 — —

Name and address of bank / building society

Name
Address
Postcode

Bank/building society account number

Account reference (if required)

8 Data protection and confidentiality

By submitting this application form (and in any subsequent dealings, which may include telephone calls) National Deposit Friendly Society Limited will hold and use your personal data. We will only hold and use your information where permitted by and in accordance with the Data Protection Act 2018. For further details on how we hold and use your personal data, please see our full General Privacy Notice which sets out:

- the types of information we collect about you;
- how we collect and use the information;
- who we might share the information with and where such information may be transferred;
- how long we will hold the information for;
- the steps we will take to make sure it stays private and secure;
- your rights in respect of your information.

The General Privacy Notice is available to view at: www.nationalfriendly.co.uk/privacy

If you would like to receive a paper copy of the General Privacy Notice, please call us on: **0333 014 6244**

Or write to us at: **National Friendly, 11/12 Queen Square, Bristol BS1 4NT**

You are responsible for making sure you provide us with accurate and up-to-date information. Please inform us when your personal information changes. If you provide information for or about another person in the context of your dealing with National Friendly, you will need to tell them how to find the General Privacy Notice and make sure they agree to us using their information for the purposes set out in it.

Marketing Preferences

National Friendly will never sell your personal data to any third parties. We would, however, like to keep you up to date with Society news, offers, competitions and other products and services that we offer. Please let us know how you'd like to be contacted below.

I agree to National Friendly contacting me by:

Email:

Telephone:

Text/SMS:

Post:

You can update your marketing preferences easily at any time by phone, email, in writing or online at www.nationalfriendly.co.uk/staytogether

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

I/We would like to apply for a With-Profits Bond and I declare that:

- Where this application has been completed by someone else, it was done so at my request.
- Where I am the proposer, I will act on behalf of the child this policy is intended to benefit.
- I agree to National Deposit Friendly processing my personal information as detailed in the General Privacy Notice provided as part of the application pack.
- 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 the policy start date will be shown on my/our 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/us after this application has been accepted and I/we will then have 30 days in which I/we can change my/our mind(s).
- 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/us and National Friendly.

First policyholder's signature or proposer's signature on behalf of a child under 16

Date

Second policyholder's signature (if applicable)

Date

Payer's signature (where the payer is not a policyholder or the proposer)

Date

We will send your welcome pack of policy documents by email. Please make sure you have included your email address on this application. If you would prefer the pack to be sent through the post, please tick here:



Instruction to your bank or building society to pay by Direct Debit

Please fill in the whole form using a 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

Reference

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

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.

To request a copy in Braille, large print or audio please call us on:

0333 014 6244

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

Or email us at:

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. Our Financial Services Register number is 110008. You can check this at: <https://register.fca.org.uk>. National Deposit Friendly Society Limited is covered by the Financial Services Compensation Scheme and Financial Ombudsman Service.