

Tax-Exempt Savings Plan 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 application 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/tesp**
- **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.

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

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

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

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 Your Policy Explained document. Please provide details here of how much and how often you are currently saving into these types of policies.

Data protection

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 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 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 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)

Date

D	D	M	M	Y	Y	Y	Y
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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:

0333 014 6244

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Or send us an email:

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.