

Monthly Savings ISA (Stocks & Shares)

Application form

Unless you are a serving officer or staff member in the Met or City police OR a current member of Metfriendly, please to send us a proof of ID (copy of passport or driving licence) and address (a recent utility bill). You should sign the back of the copies to confirm that they are a true copy of the original.

Warrant/Pay no. (If applicable)

Mr/Mrs/Ms/Miss

Surname

Forename(s)

Date of Birth

Gender M F

Home Address

Postcode

Daytime Tel No

Mobile No

Preferred Email Address

Do you have a National Insurance No? Yes No

If yes, you must enter it here

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You should be able to find your NI number on a payslip, Form P45 or P60 or a letter from HM Revenue & Customs or the DWP.

I apply to subscribe to a Monthly Savings ISA

Please enter the monthly amount, £50 minimum or £30 in your first five years of service

Amount **£**

For tax year

20

| **20**

and each subsequent year until further notice.

Please tick whichever is more relevant to you:

I am/was a member of a UK police service

I am a relative of someone who is or was working in a UK police service

If so, what is their name?

Your relationship to them

The following details must be given for either the applicant, or the applicant's partner/relative

Rank/Grade

Warrant/Payroll No

Station/Branch/Constabulary

Work Despatch Address

I confirm I have read the Key Features associated with this product, available by request or viewable at www.metfriendly.org.uk/monthlysavingsisa/keyfeatures

Declaration & Authorisation

I declare that:

- all subscriptions made, and to be made, belong to me; and
- I am 18 years of age or over; and
- I have not subscribed, and will not subscribe, more than the overall subscription limit in total to a Cash ISA and a Stocks & Shares ISA in the same tax year; and
- I have not subscribed, and will not subscribe, to another Stocks & Shares ISA in the same tax year that I subscribe to this Stocks & Shares ISA; and
- I am resident in the United Kingdom for tax purposes or, if not so resident either perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas) are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform the Metropolitan Police Friendly Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I authorise Metfriendly:

- to hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash; and
- to make on my behalf any claims to relief from tax in respect of ISA investments; and
- to deduct from my salary/bank account all such premiums that may become due.
(If you wish to pay us by Direct Debit please call us or download a Mandate form at www.metfriendly.org.uk/ddi).

I hereby apply to join the appropriate Table. I agree to the ISA terms and conditions and agree to abide by the Rules of the Society. I declare that the information given is correct to the best of my knowledge and belief.

Signature of applicant

Signature

Date

IMPORTANT – If you are the partner/spouse of a salaried police service member and they wish to pay premiums on your behalf via salary deduction, please ensure they also countersign below

Signature of payer (if different to applicant)

Signature

Date

DATA PROTECTION ACT Any information you provide will be held by the Metropolitan Police Friendly Society to administer your contracts. We will NOT disclose such information to third parties (except those who assist us in administering your contracts) unless legally required to do so. We may from time to time use it to inform you by letter or e-mail about any products and services which may be of interest to you. If you do not wish to receive such information, please tick this box. ■

When completed this form should be returned to: Metropolitan Police Friendly Society Limited
Central Court, Knoll Rise, Orpington, BR6 0JA
Despatch: MPFS Orpington

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