

# Lifetime ISA Application Form

(You must be over 18 and under 40 to be eligible to apply for a lifetime ISA)

Surname		Mr/Mrs/Ms/Miss	
Forename(s)	Date of Birth	<input type="text"/>	Gender M <input type="checkbox"/> F <input type="checkbox"/>
Home Address		Post Code	
Daytime Tel No	Mobile No		
Station/Branch (if applicable)		Preferred Email Address	
Enter National Insurance Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			

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

Please tick whichever is more relevant to you:

I am/was a member of a UK police service ☐ I am a partner/relative of someone who is or was working in a UK police service ☐

If so, what is their name?	Your relationship to them
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The following details must be given for either the applicant, or the applicant's partner/relative

Rank/Grade	Warrant/Pay No
Constabulary	Station/Branch

**I apply to open and to subscribe for a Metfriendly Lifetime ISA, starting at £  (min £100, max £333.33) each month** for the tax year 2017/2018 (06/04/2017 to 05/04/2018) and each subsequent year in which I make a payment to the account. The maximum allowance for the lifetime ISA is £4,000 for 2017/2018. If you also wish to invest a lump sum in addition to the monthly contribution the minimum is £400. Please enter the amount in the box below.

**AND / OR** (please delete whichever does not apply)

**I apply to open and to subscribe to the Metfriendly Lifetime ISA by investing a lump sum of £  (min £1200)** for the tax year 2017/2018 (06/04/2017 to 05/04/2018) and any amounts as I may decide in subsequent years. The maximum allowance for the lifetime ISA is £4,000 for 2017/2018.

☐ I enclose a cheque made payable to MPFS Ltd

**OR**

☐ I have made/will make a payment via Bank Transfer (Please call us for full details)

**Declaration to be completed if monthly premiums are to be paid via salary deduction by a salaried police service member.**

**IMPORTANT** – this section must be completed by the **salaried police service member** if they are your spouse/partner and are intending to pay the premiums for this plan on your behalf via payroll deduction. (If you wish to pay by Direct Debit instead, please call us or download a Mandate form at [metfriendly.org.uk/ddi](http://metfriendly.org.uk/ddi)).

Surname	Initials
Warrant/Pay No	Rank/Grade
I authorise the deduction from my salary of my partner's contributions	
Signed <b>POLICE OFFICER/POLICE STAFF</b>	Date

Please turn over for declaration, authorisation and signature

### Proof of ID

Unless you are intending to pay monthly premiums by salary deduction or are already a member of Metfriendly please provide reasonable proof of identity (copy of birth certificate, driving licence or passport) and of address (copy of a recent utility bill). You should sign the back of each copy to confirm it as a true copy of the original.

For your own benefit and protection, you should read the Key Features associated with this product, available by request or viewable at [metfriendly.org.uk/lisakeyfeatures](https://metfriendly.org.uk/lisakeyfeatures) (A copy will also be posted to you once your lifetime ISA is set up). If you do not understand any point please ask for further information.

By investing in this lifetime ISA you automatically become a member of Metfriendly and are subject to our Rules, which are also available on our website or on request from us.

### ISA Declaration & Authorisation

#### I declare that:

- all cash payments made, and to be made, belong to me; **and**
- Either:
  - I am 18 years of age or over, and under 40, **or**
  - The account is being opened to receive investments from another lifetime ISA, a defaulted lifetime ISA subscription or a returned withdrawal after a failed first time residential purchase, **and**
- I have not subscribed, and will not subscribe, more than the overall subscription limit in total to a cash ISA, a stocks & shares ISA, a lifetime ISA and an innovative finance ISA in the same tax year; **and**
- I have not made current year payments, and will not make current year payments, that exceed the lifetime ISA payment limit; **and**
- I have not subscribed, and will not subscribe, to another lifetime ISA in the same tax year that I subscribe to this lifetime ISA; **and**
- I have not made current year payments to or transfers from a Help to Buy ISA, and will not make current year payments to or transfers from a Help to Buy ISA to another lifetime ISA in the same tax year that I subscribed to this lifetime ISA; **and**
- This declaration shall have effect for each year in which I make a payment to the account, **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 submit lifetime ISA bonus claims to HMRC on my behalf; **and**
- To withhold and deduct from a balance in the ISA and to pay to HMRC any charges due on withdrawals, **and**
- To make a record in writing in accordance with Regulation 12B paragraph 7(a) of the Individual Savings Account Regulations where required to do so; **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 [metfriendly.org.uk/ddi](https://metfriendly.org.uk/ddi)).

**Declaration** - I apply to join the appropriate Table. I agree to the ISA Terms and Conditions and agree to abide by Metfriendly's Rules.

Signed <b>APPLICANT</b>	Date	Promotional Code
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**(If you are the spouse or family member of a salaried police service member who will be paying your premiums via salary deduction they must fill in and sign in the boxes overleaf.)**

### Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA  
Phone: 01689 891454 Fax: 01689 891455 Metphone: 846690 Email: [info@metfriendly.org.uk](mailto:info@metfriendly.org.uk)

**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. Where possible we use external information to verify your identity and to keep our records up to date on rank and location changes. We may from time to time use it to inform you about other products and services that may be of interest to you including via e-mail. If you do not wish to receive such information please tick this box. ☐

**Metfriendly is a trading name of the Metropolitan Police Friendly Society Limited.**

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.  
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