

Application Form to Transfer an ISA to a Metfriendly Lifetime ISA

You will also need to complete a Metfriendly Lifetime ISA application form unless you have already done so.

Minimum transfer limit – £1,200 unless you are also paying premiums into a Metfriendly Lifetime ISA.

Unless you are already a member of Metfriendly, please 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/Payroll No. (If applicable)

Mr/Mrs/Ms/Miss

Surname

Forename(s)

Date of Birth

 | |

Gender

M

F

Home Address

Postcode

Daytime Tel No

Mobile No

Email Address

(tick We would like to email you from time to time with relevant information on financial issues relating to the police, such as police pay, here) and products and services we provide including special offers. If you would like to receive the above information **please indicate**
 your consent by ticking the box to the left. You will be able to unsubscribe from these communications easily and at any time.

Enter National Insurance Number

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.

I apply to transfer my existing ISA A/c No

(Please tick one box only)

In whole

In part (please give details)

All except current tax year

Is this a Help to Buy ISA?

If Yes, please enclose proof such as a copy of your HTB ISA statement.

Yes

No

From (existing manager)

Name

Address

To

Metfriendly, Central Court, Knoll Rise,
Orpington, BR6 0JA

Tel: 01689 891454

Where a period of notice is required for closure/part transfer of the existing ISA I give my consent to either: **(please tick as appropriate)**

1. Serve the full notice period before this instruction can be processed; or
2. Proceed immediately with the transfer and bear consequential penalty which may be applied.

Continued
overleaf

For your own benefit and protection, you should read the Key Information Document associated with this product, available by request or on the relevant product page on our website (a copy will also be posted to you once your ISA is set up). If you do not understand any point please ask for further information.

If you are/were **NOT** in the police service, please give the name and relationship of the partner or relative who is/was.

Full name

Relationship

The following details should be given for the applicant or the applicant's partner or relative as applicable.

Rank/Grade

Warrant/Payroll No

Constabulary

Declaration & Authorisation

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 lifetime 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 contact my existing ISA manager to arrange this transfer.

I authorise my existing ISA manager (as specified):

- to transfer the ISA (account number overleaf) to Metfriendly, **and**
- to provide Metfriendly with any information, written or non-written, concerning the existing ISA, **and**
- to accept any instructions from Metfriendly relating to the ISA being transferred.

Declaration

- I hereby apply for the Metfriendly product named at the beginning of this Application document and accept the terms and conditions as described within the product literature and elsewhere within this Application document.
- I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appears on its website and is available in printed form upon request to the Secretary at the Registered Office).

Signature

Date

Promotional Code

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you any necessary legal documents, such as your annual benefit statement, and to invite you to our Annual General Meeting. Your data will only be kept for as long as is necessary to perform this task. Where possible, we use external information to verify your identity and to keep our records up to date on home address, rank and location changes. We use a third-party provider to deliver our marketing emails. We gather statistics around email opening and clicks using industry-standard technologies. For more information, please see our privacy notice at metfriendly.org.uk/privacy.

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