

Lump Sum ISA (Stocks & Shares)

Transfer Application form

Tick to confirm that you have enclosed your proof of ID and home address, and that you have signed the reverse of the copies to confirm they are true copies of the originals.
(If applicable. See page 10 for ID details.)

I am a Police Officer/Staff Volunteer/Contractor Relative Retired

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

Email Address

(tick here) We would like to email you from time to time with relevant information on financial issues relating to the police, such as police pay, 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.

Relatives - if applying as a relative, please complete below

Name of relative who works or has worked in the UK police service

Their Warrant Number

Your relationship to them

National Insurance No

For your own benefit and protection, you should read the Key Information Document associated with this product, available by request or viewable at metfriendly.org.uk. A copy will also be posted to you once your policy is set up.

I apply to transfer my existing ISA a/c no

In whole All except current tax year In part (please specify tax years)

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 the consequential penalty that may be applied.
- If you want to pay other monthly or lump sum contributions, you will need to send us the appropriate application.

Declaration & Authorisation

I declare that:

- I am 18 years of age or over; and
- I have not subscribed/make a payment to and will not subscribe/make a payment more than the overall subscription limit in total to any combination of permitted ISA types in the same tax year.

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 contact my existing ISA manager to arrange this transfer.

I authorise my existing ISA Manager (as specified overleaf):

- 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

How did you hear about Metfriendly?

I am a member Newsletter I received a letter Brochure stand Intranet Received an email
Personal recommendation Internet search Social media I spoke to a Metfriendly representative
I saw an advert - Please state which publication Other - please state

Publication/Other

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

metfriendly
save, invest and protect