

Monthly Savings ISA (Stocks & Shares)

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.

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

Warrant/Pay no. (If applicable)

Rank/Grade

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 UK police service

Their Warrant Number

Your relationship to them

Do you have a National Insurance No? **Yes** **No**

If yes, you must enter it here

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 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.

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.

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/made 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; 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 all such premiums that may become due.

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 of applicant

Signature

Date

Promotional Code

Declaration to be completed if monthly premiums are to be paid via salary for your partner's contribution

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.)

Surname

Initials

Warrant/Pay No

Rank/Grade

I authorise the deduction from my salary of my partner's contributions

Signature

Date

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