

Monthly Savings ISA (Stocks & Shares) Application Form



This product allows you to make tax-free monthly and lump sum contributions into a Stocks and Shares ISA to build up a fund accessible over the medium to long term. You can also transfer funds from other ISA providers into the fund. If you have any queries, please do not hesitate to contact us on 01689 891454.

Before you apply for our Monthly Savings ISA, please be aware that:

- ☒ You need to be aged 18 or over
- ☒ Wish to save at least £30 per month
- ☒ You are looking for medium to long-term investment (of at least 5 years)
- ☒ You are willing to accept medium risk for potential higher returns
- ☒ You want the potential for both annual bonuses and a final bonus (after 5 complete tax years)
- ☒ You want the flexibility to stop, start or adjust monthly premiums
- ☒ You understand penalties apply to withdrawals during the first 24 months

Checking the above will help ensure the product is appropriate for you. If you are in any doubt as to whether the Monthly Savings ISA is appropriate for you, please call us on 01689 891454 or email info@mpfs.org.uk

Mr/Mrs/Ms/Miss/Other	Surname	Forename(s)
First line of home address		Postcode
Date of Birth	National Insurance Number	

National Insurance Number If you have your National Insurance (NI) number please enter it in the boxes above. You can find your NI number online in your HMRC account or App, in any documents you already have, for example a payslip, P45 or P60, or at gov.uk/find-national-insurance-number. You must provide a National Insurance number to apply for an ISA unless you are not eligible for one. You can check if you're eligible and apply online at gov.uk/apply-national-insurance-number

Are you eligible for an NI number? Put an 'X' in one box

Yes ☐ If Yes, you must apply for an NI number and provide it before you complete your ISA application. See link above. No ☐

Personal Email	Mobile No
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We would like to contact 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. You will be able to unsubscribe from these communications easily and at any time.

Please provide me with the above information by

- ☐ SMS ☐ Email ☐ Post ☐ Phone ☐ None

Do you have knowledge or experience of With-Profits or pooled investments such as Stocks & Shares ISAs or With Profit Bonds?

- ☐ Yes and I have read and understood the **Monthly Savings ISA Product Guide** and **Key Information Document***
- ☐ No

*A copy of these will be available during meetings with our representatives or on the product page of the website when selecting this product online. In addition, a copy will also be posted to you once your Monthly Savings ISA is set up. If you do not understand any of the points, please ask for further information.

If Applicable

Police Join Date	
Constabulary (or connected constabulary of family member/friend etc.)	
Warrant Number/Customer/Membership No.	

What best describes you - e.g. serving Officer/Staff/retired/relative/former/current family member/friend, etc.

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For your own benefit and protection, you should read the **Key Information Document** and **product particulars** relating to this plan. A copy of this will be available during meetings with our representatives or on the product page of the website when selecting this product online. In addition, a copy will also be posted to you once your Monthly Savings ISA is set up. If you do not understand any of the points, please ask for further information.

I apply to open a Monthly Savings ISA

I would like to (please tick all that apply):

- ☐ Make a single lump sum contribution. Please note, lump sums can be added to your Monthly Savings ISA at any time. Details for how to do this will be sent to you.
- ☐ Transfer funds from an existing ISA or matured Child Trust Fund (CTF). The paperwork to transfer from an existing ISA or from a matured CTF is available online at mpfs.org.uk/transfer
- ☐ Pay monthly contributions by salary deduction (where available).
- ☐ Pay monthly contributions via deductions from current Police Pension (where available).
- ☐ Make contributions via direct debit

Please enter the monthly amount, £30 minimum.

Amount £ For tax year 2025/2026 (06/04/25 to 05/04/26) and each subsequent year until further notice.

Our Escalator

Save more in the long run with an annual escalator...by automatically increasing your monthly payments by £20 each April over 10 years, you would save an extra £13,200. The increase will take place each April starting the following calendar year and subsequent years. You can adjust the monthly payment and escalator amount at any time.

Escalation amount £10 ☐ £20 ☐ £50 ☐ £75 ☐ £100 ☐ Other ☐ £

Please note the maximum allowance for the Monthly Savings ISA is £20,000 for each tax year.

Confirming Your Identity

In order to process your application, we will refer to Credit Reference Agencies to confirm your identity. This search will leave a 'footprint' on your credit file, which is required to record that the check has taken place. This footprint is not the same as a credit check footprint and has no negative impact on your file. Please read the following:

ID Declaration

I understand that you will undertake a search with a Credit Reference Agency for the purposes of verifying my identity. To do so, the Credit Reference Agency may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained. The Credit Reference Agency may disclose that information, and the fact a search was made to its other customers for the purposes of assessing the risk of giving credit, to prevent fraud, money laundering and to trace debtors.

ISA Declaration & Authorisation

I declare that:

- All subscriptions made, and to be made, belong to me.
- I am 18 years of age or over.
- I have not subscribed, and will not subscribe, more than the overall subscription limit in total to any combination of permitted ISA types in the same tax year.
- I am resident in the United Kingdom for tax purposes:
 - or, if not so resident, 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 UK
 - or I am married to, or in a civil partnership with, a person who performs such duties
- I will inform MPFS if I cease to be resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- I agree to the ISA terms and conditions.

I authorise MPFS

- To hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash.
- To make on my behalf any claims to relief from tax in respect of ISA investments.
- To deduct from my salary/bank account all such premiums that may become due (those paying by Direct Debit should call or email us).

Declaration

- I declare that the information given is correct to the best of my knowledge and belief and apply for the Monthly Savings ISA and accept the terms and conditions as described within the product literature and elsewhere within this application. I confirm I have also read the Key Information Document.
- I apply for membership in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by MPFS's Rules at all times. (A copy of our Rules appears on mpfs.org.uk and are available in printed form upon request).

Signed **APPLICANT**

Date

Promotional Code **IF APPLICABLE**

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 legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed 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 changes. We use a third-party provider to deliver our marketing emails. We gather statistics around email open rates and clicks using industry-standard technologies. For more information, please see our privacy notice at mpfs.org.uk/privacy

Contact Details

MPFS, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Email: info@mpfs.org.uk

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