

Guaranteed 5 Year Fixed Rate Bond Application Form

The Metfriendly Guaranteed 5 Year Fixed Rate Bond may be appropriate for those who:

- Are aged 18 or over
- Want a fixed return after 5 years
- Understand they have no access to the funds during the 5 year term
- Wish to contribute a single lump sum of between £10,000 and £250,000
- Have considered fully utilising their ISA allowance.

The Metfriendly Guaranteed 5 Year Fixed Rate Bond may not be appropriate for investors who:

- Need to access their funds within the 5 year term
- Want an open ended savings product
- Do not have money set aside as an emergency fund to cover unexpected expenses.

Mr/Mrs/Ms/Miss	Surname	Forename(s)					
First line of home address		Postcode					
National Insurance Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address		Preferred contact no					

Here at Metfriendly we take your privacy seriously. We will use your email address to confirm your application. In addition, we will from time to time provide you with relevant information on financial issues relating to the Police and the products and services we provide including special offers by post. We will not contact you by phone for marketing purposes. If you prefer not to receive this information by post, you can email us at any time to unsubscribe (enquiries@mpfs.org.uk).

If you would prefer to receive relevant information on financial issues and our products and services relating to the Police, by email or text message, please indicate your consent by ticking the box. You can email us at any time to unsubscribe (enquiries@mpfs.org.uk).

Residence for tax purposes	<input type="checkbox"/> UK only	<input type="checkbox"/> Other Country/Territory (please state)
Are you a US citizen, or a US resident for US tax purposes?	Yes <input type="checkbox"/>	No <input type="checkbox"/> (please tick)
If Yes please give your US Federal Taxpayer Identifying Number (TIN)		
If applying as a relative of a serving or retired Member of the Police Service, please complete:		
Name of serving or retired Member	<input type="text"/>	Your relationship <input type="text"/>

To prove eligibility, please provide the following details for the applicant or the applicant's partner or relative (if known)

Constabulary	Prefix & Warrant/Payroll No
Rank/Grade	

Your answers to the following questions will help us to ensure the product is appropriate for you and that you understand the nature of a with-profit investment. If you are in any doubt as to whether the Guaranteed 5 Year Fixed Rate Bond is appropriate for you, please call us on 01689 891454 or email info@metfriendly.org.uk

1. Do you understand you cannot access your funds during the 5 year term?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2. Do you have funds set aside for emergency use (to cover unexpected expenses)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3. Do you understand that any gains made may be liable for additional tax (if you are a higher or additional rate tax payer)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Need another copy of this form? Perhaps for a family member or Police colleague?
Download at metfriendly.org.uk/lumpsum or call **01689 891454**

For your own benefit and protection, you should read the **policy wording** and **product particulars** relating to this plan. A copy of these will be available during meetings with Metfriendly 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 Guaranteed 5 Year Fixed Rate Bond is set up. If you do not understand any of the points, please ask for further information.

I wish to contribute £ (min £10,000 and max £250,000) to the Metfriendly Guaranteed 5 Year Fixed Rate Bond

- I enclose a cheque made payable to MPFS Ltd
- I have made/will make a payment via Bank Transfer (please quote the Warrant/Pay number as the REFERENCE) to Met Police F S L Sort Code: 56-00-33 Account Number: 49993186

Source of Funds

- Inheritance Pension commutation Investment maturity House sale
- Other (please state)

Confirming Your Identity

In order to process your application, Metfriendly 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 to verify 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 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. A record of the search will be retained by the Credit Reference Agency.

Declaration

- I hereby apply for the Metfriendly Guaranteed 5 Year Fixed Rate Bond and accept the terms and conditions as described within the product literature and elsewhere within this application. I confirm I have also read the Important Information Document and policy wording.
- 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 metfriendly.org.uk and is available in printed form upon request).

Signed

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 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 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 metfriendly.org.uk/privacy

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 X LinkedIn Facebook I spoke to a Metfriendly representative
I saw an advert - please state which publication Other - please state

Publication/Other

Contact Details

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Phone: 01689 891454 Email: info@metfriendly.org.uk

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

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