

Web

Shepherds Bonus Plan

Application Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Life assured details

1 Mr/ Mrs/ Ms / Miss / Other 2 Male Female 3 Surname

4 Forename(s)

5 Address

Postcode

6 Telephone No. **(Home)** Telephone No. **(Business)**

Telephone No. **(Mobile)** e-mail address

If you would like your policy documents sent to you by email, please tick this box

7 Date of Birth

8 Are you a homeowner? YES NO

B Your savings options

Tax Exempt Savings

1 Monthly premium £10 £15 £20 £25

2 Annual premium £270

3 The Bonus Plan minimum term is 10 years. If you require a longer term please tick the relevant box below

The maximum age at maturity is 70. 10 years 15 years 20 years 25 years other

If you wish to invest more than £25 per month you will need to take out an additional taxable savings policy. Please indicate below.

Taxable Savings

1 Monthly premium £10 £15 £20 £25 other £ *

2 The Bonus Plan minimum term is 10 years. If you require a longer term please tick the relevant box below

The maximum age at maturity is 70. 10 years 15 years 20 years 25 years other

*Please state the amount you wish to save (in multiples of £5) **You are only entitled to one Tax Exempt Plan with any Friendly Society**

C Health and activity details

Please answer yes or no to the following questions. If you answer yes you must provide complete details overleaf in section D. When answering the questions you must disclose all material facts. A material fact is anything regarding your health and lifestyle that could affect our decision to accept your application. If you are in any doubt please put it on the form. If you do not tell us about a material fact it may make the policy invalid and we may not be able to pay the balance due when a claim is made.

Are you currently suffering or have suffered in the last 5 years from any of the following

	YES	NO
• Chest pain, raised blood pressure or any problems with your cardio-vascular system including stroke or heart disease	<input type="checkbox"/>	<input type="checkbox"/>
• Asthma, bronchitis, tuberculosis or any disease of the lungs	<input type="checkbox"/>	<input type="checkbox"/>
• Any cancer, tumour or other growths	<input type="checkbox"/>	<input type="checkbox"/>
• Epilepsy, paralysis, blackouts, faints, fits or any mental nervous problems or depression	<input type="checkbox"/>	<input type="checkbox"/>
• Any disease of the kidney, liver, bladder or stomach?	<input type="checkbox"/>	<input type="checkbox"/>

C Health and activity details (continued)

- | | YES | NO |
|---|--------------------------|--------------------------|
| • Have you ever tested positive for HIV/AIDS, or hepatitis B or C or been tested /treated for any sexually transmitted diseases or are you waiting the results of such a test? If yes please provide details- for confidentiality, these maybe sent to the Underwriting Manager at our head office. | <input type="checkbox"/> | <input type="checkbox"/> |
| • Have you had to consult your doctor about any illness, operation or any medical investigation or counselling not mentioned above. | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you participate or intend to participate in any hazardous sport or activity | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you reside or work abroad? If yes please list the countries you visit and the approximate length of each stay. | <input type="checkbox"/> | <input type="checkbox"/> |

D Additional information

Detail below any information you were unable to fit on the form or further details you wish to provide

E Declaration and consent

Life Assuree's Declaration.

I apply to The Shepherds Friendly Society Limited for the Shepherds Bonus Plan.

I declare that to the best of my knowledge and belief, the answers given above are true and complete and that no important fact has been omitted or falsely stated.

I have received the Key Features document and agree that this application shall form the basis of the contract with The Shepherds Friendly Society Limited, which shall be made subject to the policy's terms and conditions.

I have received a copy of the Guide entitled "How we manage our With Profit Funds".

Consents.

The Shepherds Friendly Society Limited may use information provided in relation to this application to make electronic searches about me at Credit Reference Agencies that supply information, including information from the Electoral Roll, for the purposes of verifying my identity. I understand that these Agencies will record details of any such searches whether or not this application proceeds.

I understand that The Shepherds Friendly Society Limited reserves the right to request any such other documentary evidence it considers necessary to assist in the verification of my identity.

I understand that The Shepherds Friendly Society Limited may use information provided in relation to this application to process this application and for the ongoing management of the policy. Information may be held on computer, paper file or other appropriate medium for as long as the application is being considered, for as long as the policy remains in force and for an appropriate period thereafter.

Your information will be held by The Shepherds Friendly Society Limited. The information that you have supplied will be kept confidential and will not be disclosed to any other party without your consent unless it is lawful to do so. It may be used to keep our records up to date, for business analysis and market research purposes and to advise you by post, telephone and /or electronic methods about any products and services offered by The Shepherds Friendly Society Limited and its subsidiaries that may be of interest to you. We may pass your details to other carefully selected organisations but only for the purposes mentioned above. If you would like to request a copy of the information held about you please write to The Shepherds Friendly Society Limited Data Protection officer. A fee may be charged for providing information.

If you do not want to receive such marketing information please tick the box.

Life assured's signature

Signature

Date

Full Name

The Shepherds Friendly Society Limited

Shepherds House, Stockport Road, Cheadle, Cheshire SK8 2AA **Tel:** 0161 428 1212 **Fax:** 0161 428 3666

Email: save@shepherdsfriendly.co.uk **Web:** www.shepherds.co.uk

The Shepherds Friendly Society Limited
Shepherds House
Stockport Road
Cheadle
Cheshire
SK8 2AA

Instruction to your Bank or Building Society to pay by Direct Debit

Name(s) of Account Holder(s)

Bank/Building Society Account Number

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Branch Sort Code

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Name and full postal address of your Bank or Building Society

To: The Manager	Bank/Building Society
Postcode	

Originator's Identification Number

6	7	2	7	8	3
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Reference Number (for Office use only)

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This is not part of the instruction to your bank or Building Society.
Preferred Collection Date (PLEASE TICK)

<input type="checkbox"/> 1st	<input type="checkbox"/> 8th
<input type="checkbox"/> 16th	<input type="checkbox"/> 24th
<input type="checkbox"/> Monthly	<input type="checkbox"/> Annually

INSTRUCTIONS TO YOUR BANK OR BUILDING SOCIETY

Please pay The Shepherds Friendly Society Limited Direct Debits from the account detailed in this instruction subject to the safeguard assured by the Direct Debit Guarantee.

I understand that this instruction may remain with The Shepherds Friendly Society Limited and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)
Date



Banks and Building Societies may not accept Direct Debit instructions from some types of account

This guarantee should be detached and retained by the Payer

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, The Shepherds Friendly Society Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request The Shepherds Friendly Society Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by The Shepherds Friendly Society Limited or your Bank or Building Society you are entitled to a full and immediate refund of the amount paid from your Bank or Building Society.
- If you receive a refund you are not entitled to, you must pay it back when The Shepherds Friendly Society Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your Bank or Building Society. Written confirmation may be required. Please also notify us.