

Proposers Declaration.

I hereby apply to The Shepherds Friendly Society Limited for the Shepherds Child Trust Fund.

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 declare that:

- I am 16 years of age or over.
- I have parental responsibility for the child.
- I will be the Registered Contact for the CTF.

Consents.

I authorise Shepherd's Friendly to hold the HM Revenue and Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and

I authorise Shepherd's Friendly to make on the child's behalf any claims to relief from tax in respect of CTF investments.

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 and that of the child.

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.

I agree to the CTF Terms and Conditions.

Signature of applicant:

Date:

Important notes:

The child's Unique Reference Number (URN) and Date of Birth should agree with that supplied by HM Revenue and Customs. If the Date of Birth supplied is believed to be incorrect then please contact the HMRC CTF helpline on 0845 302 1470 (open between 8.00am and 8.00pm every day), for the records to be changed (this cannot be done by Shepherds Friendly). Any change to the child's name requires supporting documentation to be attached to this application. **All subscriptions are gifts to the child and, once accepted into the Plan, cannot be repaid.**

The Shepherds Friendly Society Limited

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