



Shepherds ISA

Top up Application Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Personal Details

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

4 Forename(s)

5 Address

Postcode

6 Telephone **(Home)** Telephone **(Mobile)**

Telephone **(Business)** Email address

7 Date of Birth

8 ISA Plan Number

B How much do you want to top your ISA up with?

Lump sum and Monthly Contributions combined cannot exceed the maximum of £10,680 in any one financial year. A financial year starts on the 6th of April and ends on the following 5th of April. If you are uncertain about the maximum increase in contributions you can make for the rest of the financial year, please call us on: 0161 428 1212.

1 Lump Sum Investment

Amount: Minimum £500

Please remember to enclose your cheque, made payable to 'Shepherds Friendly Society'

2 Increase/Decrease in Monthly Contributions

New Total Monthly Contributions:

3 Set up a new monthly direct debit contribution for this ISA

Monthly premium: Please complete the Direct Debit form attached

Please note that the minimum total monthly contribution is £30 and the minimum increase/decrease to existing contributions is £10 per month.

- I hereby apply to increase/decrease my subscription to my Shepherds Friendly Society stocks & shares ISA.
- I have read the key features, and agree that this variation shall form a basis of contract with Shepherds Friendly Society Limited.
- I agree to the ISA terms and conditions and declare that this application form has been completed to the best of my knowledge and belief.
- I have not subscribed and will not subscribe more than the ISA allowance in total to a cash ISA and a stocks and shares ISA in the same tax year. I have not subscribed and will not subscribe to another stocks and shares ISA in the same tax year that I subscribe to this stocks and shares ISA.
- I am still resident and ordinarily resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of 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 Shepherds Friendly Society if I cease to be so resident.
- A copy of the completed application and The Shepherds Friendly Society Limited's memorandum and Rules are available on request. Once this variation has been processed you will receive new policy documents and another copy of the ISA terms and conditions, however the terms and conditions can also be requested in advance. The information you provide on this form along with other information relating to you will be held by The Shepherds Friendly Society Limited and used for general purposes in particular to set up and administer the policy for which you are applying. We may occasionally provide you with details of products and services relating to other Shepherds Friendly Society Products, and those of carefully selected associated and non associated companies. We may contact you by telephone, post or electronic methods. If you would rather not receive these details or have your details referred to other organisations please tick the box.

Signature

Date

Full Name

(BLOCK CAPITALS PLEASE)

Note: Acceptance of this application is at the discretion of Shepherds Friendly.

The Shepherds Friendly Society Limited

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

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

THE SHEPHERDS FRIENDLY SOCIETY IS INCORPORATED UNDER THE 1992 FRIENDLY SOCIETIES ACT NO.240F. AUTHORISED AND REGULATED BY THE FINANCIAL SERVICES AUTHORITY AND ENTERED ON THE FINANCIAL SERVICES AUTHORITY REGISTER, NO:109997.

The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.

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)

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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)

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Date

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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.