

Web

Shepherds Over 50's Life Plan

Application Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Your personal 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

7 Date of Birth 8 Marital Status Single Married Widowed Divorced

9 Are you a homeowner? YES NO

B Premium details

1 **Your monthly premium** £ (min £10 per month - max £50 per month)

2 **Length of payment term** Throughout life for 15 years

3 **Smoker?** Have you used tobacco products or nicotine replacement therapy within the last 3 years? YES NO

C Declaration and consent

I hereby apply to The Shepherds Friendly Society Limited for the Over 50's Life 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 agree to the The Shepherds Friendly Society Limited at their discretion obtaining copies of any medical records they consider necessary following my death.

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

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 you with information, including information from the Electoral Roll, for the purposes of verifying my identity. The agencies will record details of the search whether or not this application proceeds. I understand that you reserve the right to request documentary evidence if required.

The Shepherds Friendly Society Limited may use information provided in relation to this application to process my application and for the ongoing management of my account. 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. 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 do not want to receive such marketing information, 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
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.