

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

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4 Forename(s)

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5 Address

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Postcode

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

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

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7 Date of Birth      8 Marital Status  Single  Married  Widowed  Divorced

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9 Are you a homeowner?  YES  NO

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### B Premium details

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

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

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### C Additional £250 Funeral Benefits Option

If you choose to nominate payment of your policy proceeds to Golden Charter in the event of your death and to receive an additional £250 of funeral benefits, please TICK THIS BOX

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### D 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.**

