

# Guaranteed Five Year Savings Plan Application Form



## The Metfriendly Guaranteed Five Year Savings Plan may be appropriate for those:

- Aged 18 or above.
- Who wish to pay £20 per month or more into a fixed term plan.
- Wish to receive a guaranteed sum after five years.
- Who do not wish to risk the premiums paid.

## The Metfriendly Guaranteed Five Year Savings Plan may not be appropriate for those:

- Aged 17 or under.
- Who wish to accept investment risk for potential higher returns (bonuses).
- Who may need to access their savings early (as penalties apply).

Mr/Mrs/Ms/Miss	Surname	Forename(s)		
First line of home address			Postcode	
Date of Birth			<input type="text"/>	Gender M <input type="checkbox"/> F <input type="checkbox"/>
Email Address		Preferred Contact No		

We would like to email you from time to time with relevant information on financial issues relating to the police, such as police pay, and products and services we provide including special offers. If you would like to receive the above information **please indicate your consent by ticking the box to the left**. You will be able to unsubscribe from these communications easily and at any time.

Residence for tax purposes  UK only  Other Country/Territory (please state)

Are you a US citizen, or a US resident for US tax purposes? Yes  No  (please tick)

If Yes please give your US Federal Taxpayer Identifying Number (TIN)

If applying as a relative of a serving or retired member of the police service, please complete:

Name of serving or retired member  Your relationship

The following details should be given for the applicant or the applicant's partner or relative as applicable

Constabulary  Warrant/Payroll No

**Your answers to the following questions will help us to ensure the product meets your savings needs. If you are in any doubt whether this Guaranteed Five Year Plan meets your savings needs, then please call us on 01689 891454 or email [info@metfriendly.org.uk](mailto:info@metfriendly.org.uk).**

1. Do you want a medium-term savings plan with a fixed monthly premium? Yes  No

2. Are you aware that if you withdraw your premiums during the first four years you will get back less than you put in? Yes  No

3. Do you understand that this plan is designed to provide fixed benefit equal to the premiums paid plus and additional one month's premium at maturity? Yes  No

4. Do you understand that any gains made may be liable for additional tax (if you are a higher or additional rate tax payer)? Yes  No

For your own benefit and protection, you should read the **Key Features Document** associated with this product, available by request or on the relevant product page on our website (a copy will also be posted to you once your Guaranteed Five Year Savings Plan is set up). If you do not understand any point please ask for further information.

I would like to save the following monthly amount: £  (£20 minimum)

**Rolling Plan:** To apply for a Rolling Guaranteed Five Year Savings Plan, please tick here

This means you are applying for a new plan for the same premium to start at the same time next year and every year thereafter.

## Confirming Your Identity

In order to process your application Metfriendly will refer to Credit Reference Agencies to confirm your identity. This search will leave a 'footprint' on your credit file, which is required to record that the check has taken place. This footprint is not the same as a credit check footprint and has no negative impact on your file. Please read the following:

### ID Declaration

I understand that you will undertake a search with a Credit Reference Agency for the purposes of verifying my identity. To do so the Credit Reference Agency may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained. Your information may be disclosed to a credit reference agency, which may keep a record of that information; and (b) the credit reference agency may disclose that information, and the fact that a search was made, to its other customers for the purposes of assessing the risk of giving credit and occasionally to prevent fraud, money laundering and to trace debtors.

### Declaration

- I hereby apply for the Metfriendly Guaranteed Five Year Savings Plan and accept the terms and conditions as described within the product literature and elsewhere within this application.
- I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appears on metfriendly.org.uk and is available in printed form upon request).

Signed <b>APPLICANT</b>	Date	Promotional Code
-------------------------	------	------------------

**IMPORTANT** – If you are the spouse or partner of a **salaried police service member** who will be paying your premiums via salary deduction, they must complete and sign the box below. If you are an eligible relative, work for another UK Police service or wish to pay by Direct Debit, please call or e-mail us and we will send you the form.

I authorise my partner's contributions be deducted from my salary

Warrant/Pay No	
Signed	Date

**OUR DATA PRIVACY STATEMENT** We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform this task. Where possible we use external information to verify your identity and to keep our records up to date on home address changes. We use a third party provider to deliver our marketing emails. We gather statistics around email opening and clicks using industry standard technologies. For more information, please see our privacy notice at metfriendly.org.uk/privacy

### How did you hear about Metfriendly?

I am a member  Newsletter  I received a letter  Brochure stand  Intranet  Received an email   
Personal recommendation  Internet search  Twitter  Facebook  I spoke to a Metfriendly representative   
I saw an advert - please state which publication  Other - please state

Publication/Other

### Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA  
Phone: 01689 891454 Fax: 01689 891455 Metphone: 846690 Email: info@metfriendly.org.uk

**Metfriendly is a trading name of the Metropolitan Police Friendly Society Limited.**

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.  
Incorporated under the Friendly Societies Act 1992 and registered in the UK No. 496F