

# Guaranteed 5 Year Savings Plan Application Form

## The Metfriendly Guaranteed 5 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 5 years
- Who do not wish to risk the premiums paid.

## The Metfriendly Guaranteed 5 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"/>   <input type="text"/>   <input type="text"/>	Preferred Contact No	
Email Address			
National Insurance Number	<input type="text"/>	<input type="text"/>	<input type="text"/>

Here at Metfriendly we take your privacy seriously. We will use your email address to confirm your application. In addition, we will from time to time provide you with relevant information on financial issues relating to the Police and the products and services we provide including special offers by post. We will not contact you by phone for marketing purposes. If you prefer not to receive this information by post, you can email us at any time to unsubscribe ([enquiries@mpfs.org.uk](mailto:enquiries@mpfs.org.uk)).

If you would prefer to receive relevant information on financial issues and our products and services relating to the Police, by email or text message, please indicate your consent by ticking the box. You can email us at any time to unsubscribe ([enquiries@mpfs.org.uk](mailto:enquiries@mpfs.org.uk)).

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

To prove eligibility, please provide the following details for the applicant or the applicant's partner or relative (if known)

Constabulary	Warrant/Payroll No
Rank/Grade	

**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 5 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 4 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 an 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 Information Document** and **product particulars** relating to this plan. A copy of these will be available during meetings with Metfriendly representatives or on the product page of the website when selecting this product online. In addition, a copy will also be posted to you once your Guaranteed 5 Year Savings Plan is set up. If you do not understand any of the points, please ask for further information.

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

**Rolling Plan:** To apply for a Rolling Guaranteed 5 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

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 to verify 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 future to assist other companies for verification purposes. A record of the search will be retained. The Credit Reference Agency may disclose that information, and the fact a search was made to its other customers for the purposes of assessing the risk of giving credit, to prevent fraud, money laundering and to trace debtors. A record of the search will be retained by the Credit Reference Agency.

#### Declaration

- I hereby apply for the Metfriendly Guaranteed 5 Year Savings Plan and accept the terms and conditions as described within the product literature and elsewhere within this application. I confirm I have also read the Key Features Document and policy wording.
- 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 <input type="text" value="APPLICANT"/>	Date <input type="text"/>	Promotional Code <input type="text"/>
---	---------------------------	---------------------------------------

**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 open rates 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  X  LinkedIn  Facebook  I spoke to a Metfriendly representative   
I saw an advert - please state which publication  Other - please state

#### Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA  
Phone: 01689 891454 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