

With-Profit Bond Application Form



The Metfriendly With-Profit Bond may be appropriate for investors who:

- Are aged 18 or over.
- Want a medium to long term investment (at least five years).
- Have fully utilised their ISA allowance in the current tax year.
- Are willing to accept medium risk for potential higher returns (bonuses).
- Want the potential for both annual bonuses and a final bonus (after three years).

The Metfriendly With-Profit Bond may not be appropriate for investors who:

- Are looking to invest in the short term (less than five years).
- Need a flexible investment.
- Wish to draw a regular income from their investment.
- Want a guaranteed return or capital protection.
- Do not have funds set aside as an emergency fund (to cover unexpected expenses).

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	Prefix & Warrant/Payroll No
--------------	-----------------------------

Your answers to the following questions will help us to ensure the product is appropriate for you and that you understand the nature of a with-profit investment. If you are in any doubt as to whether the With-Profit Bond is appropriate for you, please call us on 01689 891454 or email info@metfriendly.org.uk.

1. Are you looking to invest for the medium to long term (at least five years)? Yes No
2. Are you aware this product is classed as a medium risk investment? Yes No
3. 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
4. Are you aware that penalties apply to withdrawals during the first 12 months? Yes No

5. What type of savings or investments do you currently hold or have held in the past? (please tick all that apply)

- None**
- Cash accounts**, for example current accounts, savings accounts, notice accounts, fixed term accounts, cash ISAs, national savings, premium bonds and guaranteed bonds
- Fixed interest investments**, for example gilts, index-linked gilts and corporate bonds
- Pooled investments**, for example stocks and shares ISA, insurance ISA, with-profit bond/savings, unit trusts and investment trusts
- Direct Investments**, for example: company stocks and shares
- Specialist investments**, for example property (not including the home that you live in), gold, commodities, options, futures, derivatives, art and wine.

6. What is your knowledge and experience with savings and investments? (please tick the most appropriate)

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
a. I am experienced with investing money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. I am knowledgeable about saving and investing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. I am knowledgeable about with-profits investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Have you ever held any with-profits investments? (please tick one)

- Yes, I have held with-profit policies No Don't Know

8. What qualifications do you have? (please tick all that apply)

- None**
- School exams**, for example GCSE, O Level, A Level, Leaving Certificate, Higher Certificate
- University Degree**, for example BSc, BA
- Post Graduate** (Masters or Doctorate)
- Vocational Qualification**, for example, NVQ, Certificate of Knowledge of Policing, Police Promotional and/or CID exams
- Professional Qualification**, for example, Accountancy, Law or Medicine

9. What is your most recent occupation? (please tick one)

- Police Officer Police Staff Other (please state)

For your own benefit and protection, you should read the **Key Information 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 With-Profit Bond is set up). If you do not understand any point please ask for further information.

I wish to invest £ **(min £2,000; no max) in the Metfriendly With-Profit Bond**

- I enclose a cheque made payable to MPFS Ltd
- I have made/will make a payment via Bank Transfer (please quote the Warrant/Pay number as the REFERENCE) to
Met Police F S L Sort Code: 56-00-33 Account Number: 49993186

Unless you advise us otherwise, we will split your investment into denominations of £5,000. This will not affect the overall return you receive. Each Bond must comply with our minimum size (£2,000).

Source of Funds

- Inheritance Pension commutation Investment maturity House sale

- Other (please state)

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 With-Profit Bond 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 APPLICANT	Date	Promotional Code
-------------------------	------	------------------

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 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