

With-Profit Bond Application Form



metfriendly

The UK Police Family Finance Specialists

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 5 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 3 years).

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

- Are looking to invest in the short term (less than 5 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

National Insurance Number Date of Birth

Email Address Preferred Contact No

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).

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).

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

Constabulary Prefix & Warrant/Payroll No

Rank/Grade

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-Profits 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 5 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 you 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-profits policies No Don't Know

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 the With-Profit Bond is set up. If you do not understand any of the points, please ask for further information.

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

Source of Funds

- Inheritance Pension commutation Investment maturity House sale
- Other (please state)

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 With-Profits Bond 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 Information Document.
- 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

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 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

Contact Details

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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.
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