

Top Up Form

Please use this form to apply to top up the child's Foresters Friendly Society Junior ISA during the current financial year.

FOR OFFICE USE ONLY

Staff/FA/INT Name	<input type="text"/>
Contact/FA/INT Number	<input type="text"/>
Marketing Code	<input type="text"/>

1. Child's details

Title Child's first name

Middle name(s)

Last name

JISA policy number

Date of birth

Address (if different from yours)

Postcode

2. Your details

Title Mr Mrs Miss Ms Other

First name Middle name

Last name

Date of birth

Address

Postcode

Home telephone

Mobile telephone

Email

Relationship to the child

3. How much do you want to top the child's Junior ISA up with?

Lump sum and monthly contributions combined cannot exceed the maximum annual allowance in the financial year. A financial year starts on the 6th of April and ends on the following 5th of April. If you are uncertain about the contributions you can make for the rest of the financial year, please call us on 0800 783 4162.

A. Lump Sum Investments:

Amount: £ (Minimum £50).

I enclose my cheque made payable to 'Foresters Friendly Society'.

Please contact me to arrange payment by Debit Card.

B. Increase in (or commencement of) Monthly Contributions (please complete section 5):

New Total Monthly Contribution: £

Please note that the minimum total monthly contribution is £50.

4. Money Laundering Regulations

To comply with anti-money laundering requirements, we may verify your identity by carrying out an online check with a credit agency. The agency will add a note to your reference file to show that an identity check has been made. We may pass information to third parties for the prevention of crime or detection of fraud or where required by law or regulation.

Please provide your previous address if you have changed address in the last 3 months:

Previous address:

If you are making a lump sum payment over £10,000, please provide the following:

Employment status:
(e.g. employed, self employed, unemployed etc)

The source of the single premium to be invested in this plan:
(e.g. inheritance, divorce settlement, property sale, etc.)

Please turn over to continue and complete your top up

The Direct Debit Guarantee (please detach this Guarantee for your records)



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Foresters Friendly Society will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Foresters Friendly Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Foresters Friendly Society or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
 - If you receive a refund you are not entitled to, you must pay it back when Foresters Friendly Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written notification may be required. Please also notify us.

5. Instruction to your Bank or Building Society to pay by Direct Debit (please do not detach)



To The Manager

Name and full address of your Bank/Building Society branch.

Name(s) of Account Holder(s)

Sort Code -

Account Number

Originator's Identification Number

Reference Number (office use only)

Instruction to your Bank or Building Society

Please pay Foresters Friendly Society Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.

I understand that this Instruction may remain with Foresters Friendly Society and, if so, details will be passed electronically to my Bank/Building Society.

Signature Date

Signature Date

Banks/Building Societies may decline to accept instructions to pay Direct Debits from some types of account, such as a savings account.

6. How we will use your data

The information that you provide on this form will be held by Foresters Friendly Society for the purposes of providing a high quality customer experience and to keep you informed of products and services that may interest you. The ways in which we will use your data is laid out in our Privacy Policy (www.forestersfriendlyociety.co.uk/privacy-policy). We will never share your data with any other companies for their marketing purposes.

We will always respect your preferences as to the information you receive from us and we will tell you how you can opt out in every communication we send you. If you would like to opt out at any time, you can do so by calling 0800 783 4162, emailing memberservices@forestersfriendlyociety.co.uk, completing the online form available at www.forestersfriendlyociety.co.uk/contactpreferences or writing to us at: Foresters Friendly Society, 29-33 Shirley Road, Southampton SO15 3EW.

Please note that we will always send you contractual information, such as your annual bonus statement.

Where an application is made via a Financial Adviser (FA), you agree your details being disclosed to that FA until you instruct us otherwise.

7. Declaration

This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before signing them. If you do not understand any point please ask for further information.

I declare that:

- I apply to increase the subscription to a Foresters Friendly Society JISA until further notice.
- All subscriptions made, and to be made, belong to the child.
- I am 18 years of age or over.
- I declare that where I am increasing payment into their Stocks & Shares JISA, that I have not subscribed to another JISA of the same type for the same child in this tax year.
- I agree to the JISA terms and conditions.
- I am not aware that this child has another JISA of this type.
- I am not aware of other JISA subscriptions that will result in this child exceeding the annual limit.
- I will not knowingly make subscriptions to JISAs for this child that will result in the subscription limit being exceeded.

I authorise Foresters Friendly Society:

- To hold my cash subscription, other proceeds in respect of my JISA investments and any other cash; and
- To make on the child's behalf any claims to relief from tax in respect of JISA investments.

I declare that to the best of my knowledge and belief, the statements provided on this form are true and correct. I have read and understood the [JISA Key Information Document and Important Information section](#).

I understand that all correspondence relating to the plan will be sent to the child's registered contact until the child's 16th birthday, and will be sent to the child after their 16th birthday.

I understand that the child will be entitled to Foresters Friendly Society surplus in the event of the closure of the Society only after having been a member for 5 years. I understand that a copy of the Rules and Memorandum are available upon request.

I confirm that I have not been given advice by Foresters Friendly Society in relation to the top up for this plan.

Signature

Date

How to get in touch

Write to:

Foresters Friendly Society,
29-33 Shirley Road,
Southampton,
SO15 3EW

Tel: 0800 783 4162

Visit: www.forestersfriendlyociety.co.uk

Information, including a copy of this Top Up Form, is available in large print, audio and Braille upon request.

Foresters Friendly Society is the trading name of The Ancient Order of Foresters Friendly Society Limited which is an Incorporated Friendly Society (Registration No. 511F) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Registration No. 110029).