

Adviser's name _____

Advised sale: Yes No

Shepherds Over 50's Life Plan

Application Form

PLEASE COMPLETE IN BLOCK CAPITALS AND ANSWER ALL QUESTIONS

A Your personal details

1 Mr/ Mrs/ Ms / Miss / Other _____ 2 Male Female 3 Surname _____

4 Forename(s) _____

5 Address _____

 _____ Postcode _____

6 Telephone No. **(Home)** _____ Telephone No. **(Business)** _____
 Telephone No. **(Mobile)** _____ e-mail address _____

7 Date of Birth _____ 8 Marital Status Single Married Widowed Divorced

B Premium details

1 Your monthly premium £ _____ (min £10 per month - max £50 per month)

2 Length of payment term Throughout life for 15 years

3 Smoker? Have you used tobacco products or nicotine replacement therapy within the last 3 years? YES NO

C Declaration and consent

I hereby apply to The Shepherds Friendly Society Limited for the Over 50's Life Plan.

I declare that to the best of my knowledge and belief, the answers given above are true and complete and that no important fact has been omitted or falsely stated.

I agree to the The Shepherds Friendly Society Limited at their discretion obtaining copies of any medical records they consider necessary following my death.

I have read the Key Features and agree that this application shall form a basis of contract with The Shepherds Friendly Society Limited, which shall be made subject to the policy's terms & conditions.

The Shepherds Friendly Society Limited may use information provided in relation to this application to make electronic searches about me at credit reference agencies that supply you with information, including information from the Electoral Roll, for the purposes of verifying my identity. The agencies will record details of the search whether or not this application proceeds. I understand that you reserve the right to request documentary evidence if required.

The Shepherds Friendly Society Limited may use information provided in relation to this application to process my application and for the ongoing management of my account. Information may be held on computer, paper file or other appropriate medium for as long as the application is being considered, for as long as the policy remains in force and for an appropriate period thereafter.

Your information will be held by The Shepherds Friendly Society Limited. It may be used to keep our records up to date, for business analysis and market research purposes and to advise you by post, telephone and/or electronic methods about any products and services offered by The Shepherds Friendly Society Limited and its subsidiaries that may be of interest to you. We may pass your details to other carefully selected organisations but only for the purposes mentioned above. If you do not want to receive such marketing information, please tick the box.

Signature _____ Date _____

Full Name _____
(BLOCK CAPITALS PLEASE)

Note: Acceptance of this application is at the discretion of Shepherds Friendly.

The Shepherds Friendly Society Limited
 Shepherds House, Stockport Road, Cheadle, Cheshire SK8 2AA Tel: 0161 428 1212 Fax: 0161 428 3666
 Email: save@shepherdsfriendly.co.uk Web: www.shepherds.co.uk

The Shepherds Friendly Society Limited
Shepherds House
Stockport Road
Cheadle
Cheshire
SK8 2AA

Instruction to your Bank or Building Society to pay by Direct Debit

Name(s) of Account Holder(s)

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Bank/Building Society Account Number

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Branch Sort Code

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Name and full postal address of your Bank or Building Society

To: The Manager	Bank/Building Society
Postcode	

Originator's Identification Number

6	7	2	7	8	3
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Reference Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

This is not part of the instruction to your Bank or Building Society.
Preferred Collection Date (PLEASE TICK)

1st 8th
 16th 24th
 Monthly

INSTRUCTIONS TO YOUR BANK OR BUILDING SOCIETY

Please pay The Shepherds Friendly Society Limited Direct Debits from the account detailed in this instruction subject to the safeguard assured by the Direct Debit Guarantee.

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

Signature(s)

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Date

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Banks and Building Societies may not accept Direct Debit instructions from some types of account

This guarantee should be detached and retained by the Payer

The Direct Debit Guarantee

- This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society.
- If the amounts to be paid or the the payment dates change The Shepherds Friendly Society Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by The Shepherds Friendly Society Limited or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us.