

# Intermediaries - Will included

## Application Form APP169-1217

Prices applicable from 1 June 2017

FUNERAL PLANS FROM  
**Golden Charter**  
Smart Planning for Later Life 

Presented by:  
Company details:

Introducer name:  
Agency number:

Please note: the application process may be delayed if this section is not complete.

PLEASE COMPLETE THIS FORM CLEARLY IN BLOCK CAPITALS AND ENSURE ALL SECTIONS ARE COMPLETED

### 1 Plan Holder (The Member)

Date of Birth:	<input type="text"/>	First Name(s):	<input type="text"/>
Mr/Mrs/Ms/Other:	<input type="text"/>	Surname:	<input type="text"/>
Address:	<input type="text"/>		
	<input type="text"/>	Postcode:	<input type="text"/>
Email:	<input type="text"/>	Telephone No(s):	<input type="text"/>
Next of Kin Full Name:	<input type="text"/>	Relationship to Plan Holder:	<input type="text"/>

### 2 Plan Holder's Representative ONLY TO BE COMPLETED IF DIFFERENT TO SECTION 1, PLAN HOLDER

If you are taking out the plan for someone else and do not wish us to write to them, please enter your details below. All future correspondence will be sent to you. Please note where the Fixed Monthly Payment option is selected, Phoenix Life Limited will contact the plan holder to confirm Direct Debit details only.

Date of Birth:	<input type="text"/>	First Name(s):	<input type="text"/>
Mr/Mrs/Ms/Other:	<input type="text"/>	Surname:	<input type="text"/>
Address:	<input type="text"/>		
	<input type="text"/>	Postcode:	<input type="text"/>
Email:	<input type="text"/>	Telephone No(s):	<input type="text"/>
Relationship to Plan Holder:	<input type="text"/>		

### 3 Select Your Funeral Plan The plan prices below are standard prices available in most areas of the UK. In some areas, prices may vary. We will advise you of any variance before processing your application. A Will is included with the plan.

Please select your plan:      **Value Plan**      **Standard Plan**      **Select Plan**      **Premier Plan**  
**£2,895**       **£3,295**       **£3,650**       **£3,899**

### 4 Optional guarantee for Third Party Costs

For an additional £100, guarantee that third party costs will be covered if the plan holder dies within 5 years of the plan being fully paid. Not available when paying by Low Cost Instalments or Fixed Monthly Payments. Please tick the box if you would like to opt in to the 5 year guarantee.

### 5 Funeral Details Chosen Funeral Type (please tick):      Cremation      Burial

Preferred Funeral Director: <small>(optional)</small>	<input type="text"/>
	<input type="text"/>

The Value Plan includes an allowance of £700 towards third party costs. The Standard, Select and Premier Plans include an allowance of £940 towards third party costs. The purchase of a burial plot is not included within any plan. See Terms & Conditions. Golden Charter will make every effort to allocate your plan to your preferred funeral director, however this is not always possible. If this is the case, we will contact you to advise you of this and discuss an alternative choice of funeral director.

### 6 Recommended by a friend I was recommended by a friend Plan number of friend:

FOR GOLDEN CHARTER USE ONLY

Plan Number:	<input type="text"/>	Seller ID:	<input type="text"/>
			<input type="text"/>

## 7 Additional Information and Special Requests

Please provide details of any special requests or requirements, grave details if known, or any other relevant information. **Please note that some requirements may incur an additional cost, to be paid at the time of your funeral. Continue on a separate sheet if necessary.**


## 8 Payment Type Please complete either A, B or C

### A Payment in full

Debit/credit card

Please complete section 9 below

or by cheque

Please make cheque payable to 'Golden Charter Trust'

### or B Payment by Instalments

We offer two options for paying by instalments: spreading the cost of your plan over 12 months at no additional cost, or paying for your plan over any period between two and 30 years, depending on your current age, with our Low Cost Instalment Payment option.

Please refer to the separate 'Payment Information Sheet' for details of payments when choosing to pay by 12 monthly payments. For more information on our Low Cost Instalment Payment option, please speak to your local adviser or call **0800 145 6520**.

Deposit:

£49 (minimum)

Other

£

Please select payment method for your deposit:

Debit/credit card (Please complete section 9 below)

OR cheque (Please make cheque payable to 'Golden Charter Trust')

Number of years over which you wish to pay for your plan (1-30):

Monthly payment amount:

£

Please complete enclosed 'Payment by Instalments Direct Debit Mandate'. Direct Debit payments will be collected on or immediately after the 28th of each month.

### or C Payment by Fixed Monthly Payments

Complete the enclosed 'Fixed Monthly Payment Direct Debit Mandate' for Fixed Monthly Payments for the amount of:

£

(Please refer to separate 'Payment Information Sheet' for full information and Fixed Monthly Payment amounts)

Payments are made to Phoenix Life Limited. You will receive notification of the date your monthly payment will be taken once your plan has been processed. Phoenix Life Limited will share your information, including banking information obtained from third parties, with Golden Charter for the purposes of analysis and to assist you in the set up and on-going administration of the plan.

## 9 Payment by Debit / Credit Card

Please insert the amount you are paying by debit or credit card here:

£

By debit card:



Maestro



Visa Debit



Visa Electron

By credit card:



Visa



Mastercard

Name on card:

Card number:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Valid from:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Expires:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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1 or 2 digit issue number (if applicable):

<input type="text"/>	<input type="text"/>
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3 digit security code (on reverse of card):

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Signature: **X**

Date:

## 10 Client Declaration

I accept the current Golden Charter Funeral Plans Terms and Conditions.

Signature of Plan Holder or their Representative:

**X**

Date:

Use of data: Both Golden Charter and your funeral director may contact you by post, phone or email with information about other products and services which may be of interest to you. If you would prefer not to receive this information, please tick here:  Golden Charter respects your privacy and processes your personal data in accordance with current data protection legislation. Golden Charter and your funeral director will not share your data with third parties for marketing purposes



Golden Charter Limited is a Registered Provider of Funeral Plans and complies with the Rules and Code of Practice of the Funeral Planning Authority ([www.funeralplanningauthority.com](http://www.funeralplanningauthority.com)). Phoenix Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

# Fixed Monthly Payment Option Only

Golden Charter Ltd will pass these details to Phoenix Life Limited



## Instruction to your bank or building society to pay by Direct Debit

Please complete this form and send to:

Golden Charter Ltd  
Canniesburn Gate  
10 Canniesburn Drive  
Bearsden  
Glasgow G61 1BF  
on behalf of Phoenix Life Limited

Service user number

2 5 8 1 7 1

Name(s) of account holder(s)

[Empty box for Name(s) of account holder(s)]

Bank/building society account number

[Empty box for Bank/building society account number]

Branch sort code

[Empty box for Branch sort code]

Name and full postal address of your bank or building society

To: The Manager Bank/building society  
Address  
  
Postcode

Plan number (Golden Charter use only)

[Empty box for Plan number]

Banks and building societies may not accept Direct Debit Instructions for some types of account.

DDI1

Payable until age 90\*  
 Monthly Amount  
\*Fixed Monthly Payment Option is only available to UK residents between the age of 50 and 80.  
*See terms and conditions for more details.*

Instruction to your bank or building society  
Please pay Phoenix Life Limited 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 Phoenix Life Limited and, if so, details will be passed electronically to my bank/building society.

Signature(s)  
  
Date

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 accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, Phoenix Life Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Phoenix Life Limited 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 Phoenix Life Limited 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 Phoenix Life Limited asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

# Payment by Instalments Only (Including Low Cost Instalment Payments)



## Instruction to your bank or building society to pay by Direct Debit

Please complete this form and send to:

Golden Charter Ltd Canniesburn Gate 10 Canniesburn Drive Bearsden Glasgow G61 1BF
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Service user number

9	7	0	6	6	8
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Name(s) of account holder(s)


Bank/building society account number

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Branch sort code

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

Name and full postal address of your bank or building society

To: The Manager <span style="float: right;">Bank/building society</span>
Address
Postcode

Plan number (Golden Charter use only)

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	<b>Payment Period</b>
£	<b>Monthly Amount</b>
<p>The Low Cost Instalment Option is available between two - 30 years. Payment will be taken on or immediately after the 28th of each month. <i>See terms and conditions for more details.</i></p>	

Instruction to your bank or building society

Please pay Golden Charter 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 Golden Charter and, if so, details will be passed electronically to my bank/building society.

Signature(s)
Date

Banks and building societies may not accept Direct Debit Instructions for some types of account.

DDI1

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 accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Golden Charter will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Golden Charter 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 Golden Charter 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 Golden Charter asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.