



Child Trust Fund



Forester Life CTF Application

Direct

Please print this form, then complete and return to the Forester Life CTF Team, FREEPOST SEA8258, Bromley, BR2 9BR. No Stamp required.

Please complete in BLOCK CAPITALS:

Applicant's Details

Title: Forename(s): Surname:

Date of Birth: / / Sex: Male Female

Address:

Postcode:

Contact Telephone Number:

Child's Details

Title: Forename(s): Surname:

Date of Birth: / / Sex: Male Female

Voucher Details

HM Revenue & Customs Contribution: Unique Voucher Ref. No. Expiry Date: / /
(you must submit the CTF voucher with this application)

Additional Payment Details

Regular monthly subscription: Increasing annually in line with inflation, subject to HMRC maximum. Please complete the Direct Debit mandate below.

Single Subscription: Please enclose a cheque payable to Forester Life Limited.

Preferred payment date: / /

Declaration

I confirm that to the best of my knowledge and belief all information provided in my application is true and complete, and any changes in such information will be notified in writing.

I declare that:

- I am 16 years of age or over
- I have parental responsibility for the child
- I will be the Registered Contact for the CTF

I authorise Forester Life Ltd

- To hold the HM Revenue & Customs contributions, subscriptions, CTF investments, interest, dividends and any other rights or proceeds in respect of those investments and cash, and
- To make on the child's behalf any claims to relief from tax in respect of CTF investments.
- I give Forester Life Limited my explicit consent to use my personal data (including sensitive data) to process my application in accordance with the Data Protection Act 1998.
- I confirm that I have read the **Key Features** of the Forester Life Child Trust Fund and understand that no advice has been given.
- I am aware that a copy of my application and a specimen plan document are available on request.
- I agree to the **CTF Terms and Conditions**.

Signature of applicant: _____ Date: _____

Important notes:

The child's Unique Reference Number (URN) and Date of Birth should agree with that supplied by HM Revenue & Customs. If the Date of Birth supplied is believed to be incorrect then please contact the HMRC CTF helpline on 0845 302 1470 (open between 8.00am and 8.00pm every day), for the records to be changed (this cannot be done by Forester Life). Any change to the child's name requires supporting documentation to be attached to this application. All subscriptions are gifts to the child and, once accepted into the Plan, cannot be repaid.

Please complete this Direct Debit Instruction for monthly subscriptions:

Direct Debit Instruction



Please fill in this form and send it to:
Forester Life, Foresters House,
Cromwell Avenue,
Bromley, BR2 9BF

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

Originator's Identification Number

7	5	4	3	2	0
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Name and full postal address of your
Bank/Building Society
To: The Manager

Reference Number:

Bank/Building Society:

Address:

Instruction to your Bank or Building Society:

Please pay Forester Life 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 Forester Life and, if so, details will be passed electronically to my Bank/Building Society.

Postcode:

Name (s) of Account Holder(s):

Signature (s):

Bank/Building Society account number:

Date:

Branch Sort Code:

NOTE: Banks and Building Societies may not accept Direct Debit Instructions for some kinds of accounts.

(Please retain this section for your records)

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 payment dates change, Forester Life will notify you within 10 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Forester Life or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us.

Registered Office: Forester Life Ltd, Foresters House, Cromwell Avenue, Bromley BR2 9BF. Tel: 08457 990011, Fax: 020 8628 3500., e-mail: customer.services@foresters.co.uk www.foresters.co.uk

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