

The Scottish Bond Priority Application Form

Please complete this form by **typing into the boxes below**. Once the form is complete click on the 'Print' icon at the bottom of the page and follow the instructions.

1. Personal details

Title Mr Mrs Miss Ms

Surname

Forename(s)

Date of birth (Max. age 55) Sex M F

House no./ Name

Address

Postcode

Phone no. (Daytime)

Phone no. (Evening)

E-mail

2. Payment method/amount

Please indicate the amount you wish to invest for 10 years by marking the relevant box with an X (please choose only **one** option):

Monthly by Direct Debit £15 £20 £25

Yearly by Direct Debit £180 £225 £270

As payments must be made by Direct Debit, please indicate on which day of the month you would like payments to leave your account. 1st 15th

Where did you hear about the Scottish Friendly website?

If you have a code to quote, please type it here.

3. Select your gift

Please mark the appropriate box with an X to select your choice of gift.

Your gift will be issued within 30 days of your first premium being successfully collected.



4. Declaration

(Please read the declaration and important note overleaf)

Please answer the following question regarding your state of health. **If you answer 'Yes', you must supply full details on a separate sheet of paper with your application.** This will help us to assess whether we can accept your application on standard terms. Please note that if we require further information, we will write to you first asking for your permission to approach your doctor for such additional information.

Are you currently taking regular medication or undergoing medical treatment or investigation, or have you consulted a doctor in the last 5 years about anything affecting your physical or mental health (other than trivial complaints such as cold or flu)? Yes No
(If 'Yes', please attach full details)

By signing this application, I confirm I have read and understood the declaration and important note overleaf.

Signature

Date:

Some of the information may be used to advise you by post or e-mail of other products and services offered by the Scottish Friendly group of companies. If you do not wish to receive this material, please mark the box with an X.

For office use only:

999999999	
WSBH	
	WSB

Please do not detach Direct Debit form

5. Instruction to your bank or building society to pay by Direct Debit

Please fill in the form and send it to: Scottish Friendly Assurance, 16 Blythswood Square, Glasgow G2 4HJ.



Name and full postal address of your bank or building society

To: The manager Bank/building society

Address

Postcode

Name of account holder

Branch sort code

Bank/building society account number

Originator's identification number **9 9 7 1 7 1**

FOR SCOTTISH FRIENDLY OFFICIAL USE ONLY

This is not part of the instruction to your Bank or Building Society

Reference number (for office use only)

P S D / O B

Instruction to your bank or building society

Please pay Scottish Friendly Assurance 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 Scottish Friendly Assurance and, if so, details will be passed electronically to my bank/building society.

Your signature

Date

Declaration

I hereby apply to Scottish Friendly Assurance Society Limited for a Tax-Free Endowment Assurance Policy known as the Scottish Bond. I declare that, to the best of my knowledge and belief, the answers given to the questions on this application are true and complete and I agree that the information supplied will form the basis of the contract between myself and Scottish Friendly. I further declare that in arranging this policy with Scottish Friendly, I will not be exceeding my tax-free limit in respect of friendly society policies of £25 per month (or £270 per year).

Data Protection

Scottish Friendly will use the information supplied on this application to administer the policy. The information supplied will be held (and the policy will be processed) on Scottish Friendly's computer systems and may be used for risk assessment or claims handling purposes.

Money Laundering

To comply with the current money laundering regulations, we may verify your identity by carrying out an electronic check with an independent agency. This will involve an electronic search of information, including access to databases and credit data. By signing this form, you consent to us undertaking this check of your identity.

Important Note – Please read carefully

You must disclose to Scottish Friendly all material facts relevant to the insurance for which you are applying. A material fact is one which is likely to influence the decision whether or not to accept the application, or on what terms. If you are in any doubt whether a fact is material, you should disclose it. Non-disclosure of a material fact may result in Scottish Friendly refusing to pay a claim on your death. You do not have to tell us about any genetic test results you may have had. Copies of the terms and conditions of the policy and of this form are available to you on request.

Health question

If you have answered 'YES' to the medical question regarding your state of health in question 4 on page 1, please provide full details in the space below or attach full details on a separate sheet of paper with your application.

Please read and sign the declaration, then return the application to the following freepost address:

Scottish Friendly Assurance, FREEPOST, Glasgow G2 4BR

Scottish Friendly Assurance Society Limited.

Scottish Friendly House, 16 Blythswood Square, Glasgow G2 4HJ. Telephone: 0141 275 5000.

www.scottishfriendly.co.uk

Authorised and regulated by the Financial Services Authority. Member of ABI and AFS.

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 amount to be paid or the payment dates change, you will be notified at least 5 working days in advance of your account being debited.

If an error is made by Scottish Friendly 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 Scottish Friendly.