

Simply complete the Child Trust Fund (CTF) Gift Payment Form below in BLOCK CAPITALS and black ink. It is very important to read the information, answer all questions and sign the 'Declaration and Authority' section. Please print this form, then complete and return to FREEPOST Foresters Financial, Forester Life CTF Team, 2 Cromwell Avenue, Bromley BR2 9BF. No stamp required.

All contributions will be made in line with the current fund choice. Only Registered Contacts can change the fund choice at any time on MyPlans or by completing a fund switch form from [foresters.com](http://foresters.com) or contacting Customer Services.

### 1. Plan Information

Plan or URN No.  Gender Male  Female

Child's Forename(s)  Date of Birth 

D	D	M	M	Y	Y	Y	Y
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Child's Surname

### 2. Gifter's Details

Are you the Registered Contact? Yes  No

Title: Mr / Mrs / Miss / Ms / Other  Address (permanent residence)

Forename(s)

Surname  Postcode

Tel. No. (in the event of queries)  Date of Birth 

D	D	M	M	Y	Y	Y	Y
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Gender Male  Female  Email address

### 3. Monthly Contribution Details (minimum amount of £10)

Monthly Contribution £  Please complete the below Direct Debit form for monthly contributions.

Earliest start date for monthly contributions 

D	D	M	M	Y	Y	Y	Y
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**Please turn over for sections 4, 5 & 6 >**



#### Name and full postal address of your Bank or Building Society

#### Name(s) of Account Holder(s)

  


#### Branch Sort Code

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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#### Bank/Building Society Account 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"/>
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#### Instruction to your Bank or Building Society to pay by Direct Debit

Service User Number

<input type="text" value="7"/>	<input type="text" value="5"/>	<input type="text" value="4"/>	<input type="text" value="3"/>	<input type="text" value="2"/>	<input type="text" value="0"/>
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Reference 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"/>
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#### Instruction to your Bank or Building Society

Please pay Forester 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 Forester Life Limited 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. 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 Foresters will notify you 3 working days in advance of your account being debited or as otherwise agreed. If you request Foresters 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 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 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.

#### 4. Single Contribution Details (minimum amount of £10)

Single Contribution  Please enclose a cheque payable to **Forester Life Limited**.

If you wish to make a single contribution by Direct Credit please complete this section:

Single contribution via bank  Sort Code   
Account Holder's Name  Account Number

**Please note this payment does not happen automatically.** You will need to instruct the bank to make the payment to us. Our bank details for you to make the payment are: Account Name: Forester Life Ltd Account Sort Code: 60-00-01

Account Number: 00761060 IBAN: GB16NWBK6000 0100 7610 60

**Please quote the Plan number as the reference when making your payment.**

#### 5. Using your Personal Information

We are committed to ensuring your privacy and personal information is protected. This notice explains the information we may hold, how we obtain it and for what purposes, who we share it with and why, and the rights you have in respect to your information. This is further explained in more detail in our Privacy Policy.

We are Forester Life Limited (Forester Life), a company registered in England under company number 2997655. Our registered office is at Foresters House, 2 Cromwell Avenue, Bromley, BR2 9BF. We are a registered Data Controller and our Data Protection Officer can be contacted by email at [data.protection@foresters.co.uk](mailto:data.protection@foresters.co.uk) or at the above address.

Personal information is information that identifies you and the child, is about you and the child and is provided through your dealings with us. It includes your names, addresses, contact details, dates of birth and Forester Life Plan details. In addition we hold information that we use to manage our relationship with you (contact, complaints and financial information) and information about how you interact with our website. In certain circumstances we may request and receive sensitive personal information about you and the child.

The information you provide to Forester Life will be used for setting up and administering Forester Life Plans, for communicating with and keeping customers informed and for maintaining a record of complaints. In addition it will also be used for research and analysis, for marketing of our products and services and for compliance monitoring and crime prevention.

We share the information with our service providers, identity verification services such as credit reference agencies, and other parts of the Foresters organisation. We will not disclose any of the

information to any other body or organisation except to prevent crime or if required by regulations or any law enforcement organisation.

We will retain the information for as long as the child is a Forester Life Planholder, and in accordance with our data retention guidelines and legal and regulatory obligations.

Your rights in relation to the information are set out in our Privacy Policy. This is available on our website [foresters.com](http://foresters.com) or by request from Customer Services on 0333 600 0333.

The policy provides more detailed information on how to view, correct, withdraw or otherwise change the way we use the personal information.

If we have been unable to satisfy your concerns regarding any aspect of the processing or handling of the information you can contact the Information Commissioners Office on telephone helpline: 0303 123 1113, email visit [www.ico.org.uk/global/contact-us/email/](http://www.ico.org.uk/global/contact-us/email/) or by post at Information Commissioners Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

By submitting the declaration you will be confirming that you have read this notice about using the personal information.

#### Electronic marketing preference

From time to time Foresters Financial will send information about relevant products and services via electronic methods such as email. We will not disclose your details to anyone outside of Foresters Financial for marketing purposes and you may change your marketing preference at any time.

If you prefer NOT to receive marketing via electronic methods please tick the box

#### 6. Declaration and Authority

I apply to contribute to the CTF for the benefit of the child named in this Application

I declare that:

- I am 16 years of age or over;
- all contributions made by me are gifts to the child and cannot be reclaimed by me;
- the information provided by me in making this application is true and complete and to the best of my knowledge and belief; and

Signature of applicant

Date

- I have not received any financial advice from a Forester Life Financial Adviser in respect of this Additional Gift Payment.

I authorise Forester Life Limited:

- to use the child's and my personal information for the purpose set out under 'Using your Personal Information' section above.

I confirm that I have read this Declaration in full and wish to proceed.

