

Investment ISA (Stock & Shares) Application Form (B)



All other applicants (including retired officers) who are not on the MPS or City of London Police Payroll

Applicant

Surname

Mr/Mrs/Ms/Miss

Forename(s)

Date of Birth

Gender **M** **F**

Nationality

Country of Birth

Home Address

Postcode

Daytime Tel No

Mobile No

Preferred Email Address

Do you have a National Insurance Number? **YES** **NO**

If YES you must enter it here

You should be able to find your NI number on a payslip, Form P45 or P60 or a letter from HM Revenue & Customs, a letter from the DWP, or pension order book.

If you are/were **NOT** in the Police Service, please give the name and relationship of the partner or relative who is/was

The following details must be given for either the applicant, or the applicant's partner/relative named above as applicable -

Rank/Grade

Constabulary

Warrant/Payroll No (MPS or City only)

I apply to subscribe to:

Please remember to include proof of identity

ISA Bond (lump sum)

£

Please enter the total amount, £1000 minimum.

for the tax year 20 /20 *and any amounts as I may decide in subsequent years.

Please make cheques payable to MPFS Ltd.

Monthly Savings Plan

£

Please enter the monthly amount, £50 minimum.

for the tax year 20 /20 *and each subsequent year until further notice.

*Insert tax year

Declaration & Authorisation

I declare that:

- all subscriptions made, and to be made, belong to me; **and**
- I am 18 years of age or over; **and**
- I have not subscribed, and will not subscribe, more than the overall subscription limit in total to a Cash ISA and a Stocks & Shares ISA in the same tax year; **and**
- I have not subscribed, and will not subscribe, to another Stocks & Shares ISA in the same tax year that I subscribe to this Stocks & Shares ISA; **and**
- I am resident in the United Kingdom for tax purposes or, if not so resident either perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas) are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform the Metropolitan Police Friendly Society if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I authorise MPFS Ltd

- To hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash; **and**
- To make on my behalf any claims to relief from tax in respect of ISA investments; **and**
- To deduct from my salary all such premiums that may become due.

I hereby apply to join the appropriate Table and agree to abide by the ISA terms and conditions and Rules of the Society. (A copy of the Rules and Tables is available on request.) I declare that the information given is correct to the best of my knowledge and belief.

Signed Date

IMPORTANT - this section must be completed by the **salaried police service member** if they are your spouse/partner and are intending to pay the premiums for this plan on your behalf via payroll deduction. (If you wish to pay by Direct Debit instead, please contact us for a Mandate form.)

Surname Initials

Warrant/Pay No Rank/Grade

I authorise the deduction from my salary of my partner's contributions

Signature Date



DATA PROTECTION ACT Any information you provide will be held by the Metropolitan Police Friendly Society to administer your contracts. We will NOT disclose such information to third parties (except those who assist us in administering your contracts) unless legally required to do so. We may from time to time use it to inform you by letter about any products and services which may be of interest to you. If you do not wish to receive such information, please tick this box.