OFFICE USE ONLY	MEMBER NO					NOMINEE NO
BOND NUMBER	PFA/IFA	DATE OF ENTRY	DATE PAID	AMOUNT PAID	EXIT MODE	EXIT DATE

PERSONAL DETAILS

RED ROSE ASSURANCE

Making Mutuality Meaningful

Please complete fully in block capitals
Applicant

TITLE:	Male /Female	SURNAME:

FORENAMES:

ADDRESS:

	POST CODE:	DATE OF BIRTH:

TEL NO:	MOBILE NO:	EMAIL ADDRESS:

Are you a home owner? Yes No	Do you have a National Insurance Number? Yes No	If yes please enter here. You should be able to find your NI number on a payslip, form P45 or P60, a letter from the HM Revenue & Customs, a letter from the DWP or pension order book.

INVESTMENT

I apply to subscribe to a Red Rose Assurance Stocks and Shares ISA for the tax year 20 /20

And each subsequent tax year until further notice, in accordance with the Terms and Conditions

I wish to invest:

Regular Monthly Premium (Min £50 a month) £ Lump-sum (Min £500) £

Maximum total contributions must not exceed ISA limits

Declarations

I declare that:

- All subscriptions made and to be made belong to me.
- I am 18 years of age or older
- I have not subscribed and will not subscribe more than the ISA allowance in total to a cash ISA and a Stocks & Shares ISA in the same tax year.
- I have not subscribed and will not subscribe to another Stocks & Shares ISA in the same tax year that I have subscribed to this Stocks & Shares ISA.
- I am resident and ordinarily resident in the UK for tax purposes or, if not so resident either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2008 (Crown employees serving overseas) are treated as being performed in the UK, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Red Rose Friendly Society if I cease to be so resident and ordinarily resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- I declare to the best of my knowledge and belief the answers given above are true and complete and that no important fact has been omitted or falsely stated.
- I have received the Key Features document and agree that this application shall form the basis of the contract with the Red Rose Friendly Society Limited which shall be made subject to the policy's terms and conditions.

I authorise The Red Rose Friendly Society Limited

to hold my cash subscriptions, any other proceeds in respect of my ISA investment and any other cash,

and

to make on my behalf any claims to relief from tax in respect of my ISA investments.

Consents.

- I agree to the ISA terms and conditions.
- I declare that this application form has been completed to the best of my knowledge and belief.
- I understand that the Red Rose Friendly Society reserve the right to request any such other documentary evidence it considers necessary to assist in the verification of my identity.
- The Red Rose Friendly Society Limited may use information provided in relation to this application to make searches about me at Credit
- Reference Agencies that supply such information, including information from the Electoral Roll, for the purpose of verifying my identity.
- I understand that the agencies will record details of any such searches whether or not this application proceeds.
- I understand that the Red Rose Friendly Society Limited may use information provided in relation to this application to process the application and for the ongoing management of my policy. Information may be held on computer, paper file or other appropriate medium for as long as the application is being considered, for as long as the policy remains in force and for an appropriate period thereafter.
- Your information will be held by The Red Rose Friendly Society Limited. The information that you have supplied to us will be kept confidential and will not be disclosed to any other party without your consent unless it is lawful to do so.
- It may be used to keep our records up to date, for business analysis and market research purposes and to advise you by post, telephone and or electronic methods about any other products and services offered by The Red Rose Friendly Society Limited. That may be of interest to you.

If you do not wish to receive such marketing information please tick the box.

Signature **Date**

Please note: The acceptance of this application is at the discretion of The Red Rose Friendly Society Limited.

If you are investing by lump-sum please forward your cheque for the stated amount together with this fully completed application form to:

The Red Rose Friendly Society Limited, Parkgates, 52a Preston New Road, Blackburn, Lancashire, BB2 6AH
Freephone: 0800 7310072 facsimile: 01254 222705 email: info@redroseassurance.co.uk
Established 1863, incorporated under The Friendly Societies Act 1992, Reg. No 43 Coll. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority

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