

Over 50s Life Insurance

Please complete in BLOCK CAPITALS and answer all questions

Company name:

Adviser name:

Advised sale: Yes

No

Please choose delivery option:

Original policy to client copy to adviser

Original policy plus copy to adviser

A Your personal details

1 Mr/Mrs/Ms/Miss/Other

2 Male

Female

3 Forename(s)

4 Surname

5 Address

Postcode

6 Telephone No. (Home)

Telephone No. (Mobile)

Email

7 Date of birth

/ /

8 Are you currently a UK resident? Yes

No

(For the purposes of this plan, the United Kingdom includes the Isle of Man)

B Premium details

1 Monthly premium

£

(min £10 per month - max £50 per month)

2 Smoker? Have you used tobacco products or nicotine replacement therapy, including vaping within the last 12 months?

Yes

No

C Additional Funeral Benefit Option

Choose to nominate payment of your policy proceeds to Co-op Funeralcare in the event of your death and receive a discount of up to £250 from the cost of your funeral.

Please tick box

For more information about Co-op Funeralcare and our Funeral Benefit Option, please visit: www.shepherdsfriendly.co.uk/plans/insurance/over-50-life-insurance

D Declaration and consent

How will we use your data?

To help us handle any queries you might have and for keeping records of communications. If you contact us by telephone, email or post we may collect and retain your contact details and the contents of your communication in hard and/or electronic copy. We would like to make you aware that calls to Shepherds Friendly may be recorded for training or monitoring purposes.

To work with carefully selected third parties who help us to administer your plan and provide essential services to you. For example, to make electronic searches about you at Credit Reference Agencies that supply information, including information from the Electoral Roll, for the purposes of verifying my identity. I understand that these Agencies will record details of any such searches whether or not this application proceeds.

I understand that when completing an Over 50s Life Insurance application on behalf of another person, credit reference and additional verification identity checks will be completed on that individual, and I declare that I have made the person I am applying for aware of this.

I understand that The Shepherds Friendly Society Limited reserve the right to request any such other documentary evidence it considers necessary to assist in the verification of my identity.

To collect and process personal information about you in relation to this application and for the ongoing management of my plan. 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 plan remains in force and for an appropriate period thereafter.

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 products and services offered by The Shepherds Friendly Society Limited and its subsidiaries that may be of interest to you.

To make a claim your dependents need to complete a claim form, which may require additional personal information to be submitted, which may include sensitive personal data as per the UK GDPR definition. This enables us to handle the claim quickly and efficiently. It also allows us to carry out necessary investigative processes to prevent fraudulent claims.

Your information will be held by The Shepherds Friendly Society Limited. The information that you have supplied will be held securely, in accordance with data protection rules and will not be disclosed to any other party without your consent unless it is lawful to do so.

If you would like to request a copy of the information held about you, please write to The Shepherds Friendly Society Limited Data Protection officer.

If you have chosen to nominate payment of the proceeds of this plan to Co-op Funeralcare.

On your death the proceeds of this plan will be paid directly to Co-op Funeralcare once your funeral has been provided. Co-op Funeralcare will, depending on the funeral chosen, provide a discount of up to £250 from the cost of your funeral. If you were to die of natural causes or a medical condition within the first two years of your plan start date and all your payments are up to date, we will only pay back a value equal to 150% of the premiums you have paid directly to your estate. You will also not be eligible for the discount if you have selected the Funeral Benefit Option.

Your communication preferences

Your privacy is of the highest importance to us, and unless you give us permission to do so, we will never release your Personal Information to any outside company for their mailing or marketing purposes.

To ensure that we send you the right information to you, please let us know your communication preferences:

I would like to receive marketing communications by:

Post Email Telephone Text message

View our full privacy notice by visiting our website - www.shepherdsfriendly.co.uk/privacy-policy

If you wish to update or opt-out of receiving marketing communications at any time, please get in touch by phone or email.

Essential member communications

Please note: We are required by our regulators, the Financial Conduct Authority and the Prudential Regulation Authority, to give all our members access to plan information and keep them up to date on any changes to their plans. In addition to this, we are also required to invite members to our Annual General Meeting, which involves the distribution of a voting paper, voting guide and AGM information. We also collate member feedback via annual surveys, which helps us improve our plans and service offered to our members. These essential and required communications will be sent out at least once a year.

For your own benefit and protection we recommend that you read these terms carefully before agreeing to them. If you have any questions or would like to discuss them in further detail, please get in touch.

I declare that:

- I am aged between 50 and 80;
- I am resident in the United Kingdom (includes the Isle of Man);
- 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 Plan Summary document and agree that this application shall form the basis of the contract with The Shepherds Friendly Society Limited, which shall be made subject to the plan's Terms and Conditions;
- I have read and understood the Plan Summary and Important Information Document* (It is important that you understand the Plan Summary before signing this application, please contact the Society, if there are any features of the Plan Summary that you do not understand);

I agree to these terms and I understand that I have not received financial advice from Shepherds Friendly in relation to the purchase of this plan.

Please tick box

Signature

Date

Full Name

(BLOCK CAPITALS PLEASE)

Note: Acceptance of this application is at the discretion of Shepherds Friendly.



The Shepherds Friendly Society Limited Registered Office:

Haw Bank House, High Street, Cheadle, Cheshire SK8 1AL

Telephone: 0800 526 249

Email: info@shepherdsfriendly.co.uk

Website: www.shepherdsfriendly.co.uk

Shepherds Friendly is a trading name of the Shepherds Friendly Society Limited which is an incorporated Friendly Society under the Friendly Societies Act. Registered No 240F. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, Financial Services Register No 109997. The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.

