

MPFS Stocks & Shares ISA Partner / Relative Application (Form B)

(of serving / retired officer or police staff)

Related members Warrant/Payroll No

Relationship to Applicant

Applicant Surname Mr/Mrs/Ms/Miss

Forename(s)

Date of Birth Gender M F

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.

Station / Branch

Home Address

Postcode

Daytime Tel No Mobile

ISA Details I apply to subscribe to:

Monthly Savings Plan

£ (Please enter the monthly amount)

for the tax year 20 /20 * and each subsequent year until further notice. (A direct debit must be set up unless contributions are to be deducted from your partner's salary.)

* Insert Tax Year

ISA Bond (lump sum)

£ (Please enter the total amount)

for the tax year 20 /20 * and any amounts as I may decide in subsequent years. **You must enclose a separate cheque (max £7,200 min £500) with each application. Please make cheques payable to MPFS Ltd.**

* Insert Tax Year

How did you obtain this brochure: Website Aware

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 £7,200 in total to a Cash ISA and a Stocks & Shares ISA in the same tax year; and
- 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 and ordinarily 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 (Earning & 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 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 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.

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 serving police officer or police staff.

Surname Initials

Warrant/Pay No Rank/Grade

I authorise the deduction from my salary of my partner's (legal spouse or registered civil partner) contributions. (Any other relative must complete a separate Direct Debit)

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.