



# Declaration & Authorisation

## I declare that

- all subscriptions made, and to be made, belong to me; (only applies if the transfer includes subscription made in the current tax year. Otherwise please delete); 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
- 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; (only applies if the transfer includes subscriptions made in the current tax year. Otherwise please delete); 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 (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 MPFS 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 (only applies if the transfer includes subscriptions made in the current tax year. Otherwise please delete).

## I authorise MPFS Limited:

- to hold my cash subscriptions, any other proceeds in respect of my ISA investments and any other cash;
- to make on my behalf any claims to relief from tax in respect of ISA investments; and
- to contact my existing ISA manager to arrange this transfer.

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 this application form has been completed to the best of my knowledge and belief.

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 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.)

04/08