

Application Form

Guaranteed Anniversary Bonus Bond

Once you have decided to apply for a Healthy Investment Guaranteed Anniversary Bonus Bond please complete this application form and return it to us. If you have any questions about completing this form please telephone us on 0161 762 5790.

PLEASE USE BLOCK CAPITALS TO COMPLETE THE FORM

THIS FORM IS DOUBLE SIDED, PLEASE SIGN THE DECLARATION ON THE REVERSE

BONDHOLDER

Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	Address:
Forename(s):	
Surname:	
Date of birth: <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Postcode:
Telephone number:	Email address:

JOINT BONDHOLDER (IF APPLICABLE) OR PREMIUM PAYER IF THE BONDHOLDER IS UNDER 16

Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	Address:
Forename(s):	
Surname:	
Date of birth: <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Postcode:
Telephone number:	Email address:

THE INVESTMENT

Investment (minimum £500) £ _____

Please enclose your cheque payable to Healthy Investment. If you wish to submit your investment by bank transfer please contact our office for details.

MEMBER WITHDRAWALS

If you would like to make withdrawals from your investment please complete below:

Amount £ _____ or _____% Frequency _____ Commencement date _____

Bank name:	Branch:
Address:	Account name:
	Sort code: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Postcode:	Account number: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

GENERAL DATA PROTECTION REGULATION

The General Data Protection Regulation (GDPR) requires us to provide you with a Privacy Notice. You can obtain a copy from our website at www.healthyinvestment.co.uk/privacy-notices or you can request a copy to be sent by post by telephoning the office on 0161 762 5790. The information you provide us with will be held by Healthy Investment. It will be used for setting up and administering your policy. Some information from credit reference agencies may be used to establish your identity in accordance with anti-money laundering rules. We may be required by law to disclose information regarding you or your policy to the regulatory authorities. If you have been introduced to Healthy Investment by an Introducer, we will notify them that your policy has gone live and of any subsequent cancellation. We will not share any other information with them. If you have arranged this policy through a financial adviser without receiving advice, we will share information with the adviser on the performance of your policy unless you tell us otherwise. If you have provided your email address, Healthy Investment will send you information regarding this investment and the governance of the Society by email. If you do not want to receive this information by email then please let us know. If you would like to receive our regular newsletter by email and other emails which, under GDPR, would be classed as marketing emails, then you need to give us consent to send them.

I consent to receiving these emails from Healthy Investment.

You can stop receiving these emails at any time by clicking the unsubscribe link at the bottom of the emails we send or by contacting the office. We will only send you occasional emails and we will not share your data with any other companies to market their products to you. We may record your telephone calls with us for training and compliance purposes.

HEALTHY INVESTMENT DECLARATION

Please read the following statements carefully and only sign the declaration if you agree with them. If you have any questions regarding them please contact us.

I have been provided with a Key Information Document and the full Terms and Conditions and I understand the importance of reading these as they contain the terms and conditions of the contract I am entering into with Healthy Investment.

I have not received advice on the suitability of this policy for me.

I understand that this application and declaration and any additional information provided by me shall form the basis of the contract between myself and Healthy Investment and confirm that to the best of my knowledge all the information provided is accurate.

I agree to advise Healthy Investment in writing of any changes to this information including a change of address.

I understand that providing false information or failing to disclose a material fact, that is anything that an insurer would regard as likely to influence the assessment, underwriting or acceptance of this application, may result in Healthy Investment cancelling this policy or may affect the benefits payable under this policy. If you are in any doubt whether a fact is material, you should disclose it to us in writing.

I declare that I am temperate (moderate) in my use of, or abstain from, alcoholic beverages.

I am a UK resident for tax purposes (if you are not or at any time in the future you cease to be a UK resident for tax purposes you must notify us immediately).

The information I have provided is correct to the best of my knowledge and belief.

I agree to the terms and conditions of the Healthy Investment Guaranteed Anniversary Bonus Bond.

Bondholder (or parent/guardian if the bondholder is under 16)

Signature

Date

Joint Bondholder (if applicable)

Signature

Date

FOR OFFICE USE ONLY

Date received

Compliance checked

Money laundering checked

Agent/Introducer ref:

Policy No:

Member No:

Healthy Investment

2 The Old Court House, Tenterden Street, Bury, BL9 0AL.

Tel: 0161 762 5790 Fax: 0161 764 3557

Email: enquiries@healthyinvestment.co.uk

www.healthyinvestment.co.uk