

# Gift Application Form

## Child Trust Fund

Once you have decided to make an additional investment into a Healthy Investment Child Trust Fund please complete this application form and return it to us or your financial adviser. 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**

### YOUR DETAILS

Anyone can make a contribution to a Child Trust Fund.

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:	
Telephone number:	Postcode:
Email address:	

### THE CHILD OR YOUNG PERSON'S DETAILS

Forename(s):	Address (if different):
Surname:	
Date of birth:	Postcode:

Unique reference number if known.

### THE INVESTMENT (MINIMUM INVESTMENT £10)

Single investment and/or  £ Please enclose your cheque payable to Healthy Investment

Monthly investment  £ Please complete the Direct Debit mandate

If you are making a monthly investment what is your preferred collection date?  1st of the month or  15th of the month

### 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](http://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, 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

#### INSTRUCTION TO YOUR BANK OR BUILDING SOCIETY TO PAY BY DIRECT DEBIT



Name and full postal address of your Bank or Building Society

To: The Manager	Bank/Building Society	Service User Number: <input type="text"/> 6 <input type="text"/> 7 <input type="text"/> 6 <input type="text"/> 4 <input type="text"/> 8 <input type="text"/> 1
Address		Reference 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"/>
Postcode		Please pay Healthy Investment Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Healthy Investment and if so, details will be passed electronically to my Bank/Building Society.
Name(s) of Account Holder(s):		
Branch Sort Code: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		SIGNATURE: <b>X</b>
Bank/Building Society 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"/>		Date:

Banks and building societies may not accept Direct Debit instructions for some types of account

## CHILD TRUST FUND DECLARATION

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

The government limits the amount that can be invested in a Child Trust Fund each subscription year, which runs from the child's birthday. I will not knowingly make subscriptions that will result in this child exceeding the annual limit.

I understand that contributions to a Child Trust Fund are a gift to the child who becomes the beneficial owner of the monies invested. They cannot be repaid to you if at a later date you change your mind.

I understand that this application and declaration and any additional information provided by me shall form the basis of the contract between myself and the Society 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.

I understand that providing false information or failing to disclose a material fact may result in Healthy Investment cancelling this policy or may affect the benefits payable under this policy.

SIGNATURE

DATE

X

# HealthyInvestment

ethical investments since 1835

### 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

Healthy Investment is the trading name of The Rechabite Friendly Society Limited, an incorporated friendly society (register no. 218f) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register no. 109994. ADV / DIR 03 01 04/19

## IFA SECTION - FOR FINANCIAL ADVISER USE ONLY

Name of adviser:	IFA firm:
Advised <input type="checkbox"/> Non advised sale <input type="checkbox"/>	

A copy of the Guarantee will be sent to you with your letter giving you advanced notice of the first collection.

### The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Healthy Investment will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Healthy Investment to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Healthy Investment or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Healthy Investment asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

#### Healthy Investment

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