

Lifetime Care Plan
For financial adviser use only.



Intermediary Application Form

Confidential

Thank you for your interest in British Friendly's Lifetime Care Plan. Please complete this form and return it with the requested documentation to careplan@britishfriendly.com or 45 Bromham Road, Bedford MK40 2AA.

Section 1 - Details of Firm

Full Name of Intermediary Firm:

Trading Name of Intermediary Firm:
(if applicable)

Type of Firm: (please tick one)

- Limited Company Partnership
 Sole Proprietor Limited Liability Partnership (LLP)

Trading address:

Postcode:

Registered Office:
(Not required for sole traders)

Postcode:

Telephone number:

Email address:

Website address:

Contact name, address and postcode, for service of notices under the Lifetime Care Plan - Intermediary Terms of Business:

Full names of directors, partners, or sole proprietor:

Section 2 – Status of Intermediary Firm

FCA Firm Reference No. (FRN):

Companies House Number:
(if applicable)

ICO Reference No.:

Are you a member of a compliance support services organisation?

Yes No

If yes, please provide their name:

Section 3 – Bank Details

Please provide details of the bank account you would like facilitated adviser charges paid into, and provide a bank statement dated within the past 3 months.

Please note: Other than in the case of a sole trader, we are unable to pay into a personal bank account, so you'll need to provide us with the bank account details for your firm. We will only make payments into high street bank accounts, we do not make payments to online-only accounts.

Name of bank:

Address:

Postcode:

Sort code:

Account number:

Name of account:

Email address for statements of account:

Section 4 – Confirmation

I/We confirm that the answers given above are correct to the best of my/our knowledge and belief.

I/We have read, understand and agree to the terms of the Society's Privacy Policy for Intermediaries, the latest version of which can be accessed at <https://www.britishfriendly.com/info/privacy-policy/>.

I/We also understand that, where you are required to do so in order to fulfil your contractual obligations to me/us or to our customers or where you have a legitimate business interest in doing so, you may share this personal data with your service providers, agents and third parties including but not limited to:

- auditors;
- identity authentication agencies;
- medical agencies;
- reinsurers and other insurers;
- underwriters;
- industry forums;
- fraud prevention and law enforcement agencies; and
- legal and regulatory bodies including the Association of British Insurers.

I/We acknowledge receipt of a copy of the Society's Lifetime Care Plan - Intermediary Terms of Business and agree to abide by them. I/We confirm our understanding that by completing and returning this application form we shall be deemed to have accepted the Society's Lifetime Care Plan - Intermediary Terms of Business.

I/We understand that any information provided in this application form will be used and stored as described in the Society's Privacy Policy for Intermediaries and in the 'Data Protection' section of the Lifetime Care Plan - Intermediary Terms of Business.

I/We confirm that I/we am/are duly authorised to enter into an agreement with the Society on behalf of the Intermediary named in this application form.

Name: (please print)

Status of signatory:
(please note that only directors, partners or sole proprietors may sign this application form)

Signature on behalf of the Intermediary Firm:

Date:

Section 5 – Communications about our products and services

We may email you about similar products and services we offer.

If you are an individual, sole trader or partner in a general partnership, you can opt out of these emails now or at any time in the future.

Tick here if you do not want to receive marketing emails from British Friendly.

British Friendly Society Limited
45 Bromham Road, Bedford, MK40 2AA

T: 01234 348007

E: careplan@britishfriendly.com

W: www.britishfriendly.com

**BRITISH
FRIENDLY**

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