

## Forester Life Registered Contact Application - 16 years and over

This application enables a person who is 16 years or over, to apply to be the Registered Contact of their Child Trust Fund (CTF) or Junior Individual Savings Account (Junior ISA). It is very important to read the information, answer all questions and sign the 'Declaration and Authority' section. Please print this form and return to FREEPOST RSKL-ATSJ-JHYS, Forester Life CTF Team, 2 Cromwell Avenue, Bromley BR2 9BF. No stamp required.

**Important Note:** Any change to your name or date of birth requires supporting documentation to be attached to this application.

### 1. Your Details

I apply to become the Registered Contact for the CTF/Junior ISA of:

Title: Mr / Mrs / Miss / Other	<input type="text"/>	Address (permanent residence)	<input type="text"/>
Forename(s)	<input type="text"/>		<input type="text"/>
Surname	<input type="text"/>		<input type="text"/>
Tel. No. (in the event of queries)	<input type="text"/>	Postcode	<input type="text"/>
Gender	Male <input type="checkbox"/>	Female	<input type="checkbox"/>
Plan Number	<input type="text"/>	Correspondence preference	Email <input type="checkbox"/> Post <input type="checkbox"/>
Email address	<input type="text"/>	Unique Reference Number/ National Insurance Number (if applicable)	<input type="text"/>
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"/>	<i>Please provide your Unique Reference Number/ National Insurance Number to help us process your application.</i>	

### 2. Using your Personal Information

We are committed to ensuring your privacy and personal information is protected. This notice explains the information we may hold, how we obtain it and for what purposes, who we share it with and why, and the rights you have in respect to your information.

We are Forester Life Limited (Forester Life), a company registered in England under company number 2997655. Our registered office is at Foresters House, 2 Cromwell Avenue, Bromley, BR2 9BF. We are a registered Data Controller and our Data Protection Officer can be contacted by email at [data.protection@foresters.co.uk](mailto:data.protection@foresters.co.uk) or at the above address.

Personal information is information that identifies you, is about you and is provided through your dealings with us. It includes your name, address, contact details, date of birth and Forester Life Plan details. In addition we hold information that we use to manage our relationship with you (contact, complaints and financial information) and information about how you interact with our website. In certain circumstances we may request and receive sensitive personal information about you.

The information you provide to Forester Life will be used for setting up and administering Forester Life Plans, for communicating with and keeping customers informed and for maintaining a record of complaints. In addition it will also be used for research and analysis, for marketing of our products and services and for compliance monitoring and crime prevention.

We share your information with our service providers, identity verification services such as credit reference agencies, and other parts of the Foresters organisation. We will not disclose any of your information to any other body or organisation except to prevent crime or if required by regulations or any law enforcement organisation.

We will retain your information for as long as you are a Forester Life Planholder, and in accordance with our data retention guidelines and legal and regulatory obligations.

Your rights in relation to your information are set out in our Privacy Policy. This is available on our website [foresters.com](http://foresters.com) or by request from Customer Services on 0333 600 0333.

The Privacy Policy provides more detailed information on how to view, correct, withdraw or otherwise change the way we use your personal information.

If we have been unable to satisfy your concerns regarding any aspect of the processing or handling of your information you can contact the Information Commissioners Office on telephone helpline: 0303 123 1113, email visit [www.ico.org.uk/global/contact-us/email/](http://www.ico.org.uk/global/contact-us/email/) or by post at Information Commissioners Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

By submitting the declaration you will be confirming that you have read this notice about using your personal information.

#### Electronic marketing preference

From time to time Foresters Financial will send information about relevant products and services via electronic methods such as email. We will not disclose your details to anyone outside of Foresters Financial for marketing purposes and you may change your marketing preference at any time.

If you prefer NOT to receive marketing via electronic methods please tick the box

### 3. Declaration and Authority

I declare that:

- I am 16 years of age or over;
- I am the child of the CTF/Junior ISA;
- I will be the Registered Contact for the CTF/Junior ISA;
- the information provided by me in making this application is correct and to the best of my knowledge and belief.

I authorise Forester Life Limited:

- to hold the subscriptions, any other rights or proceeds in respect of the CTF/Junior ISA investments and any other cash;
- to make any claims to relief from tax in respect of CTF/Junior ISA investments, and
- to use my personal information for the purpose set out under 'Using your Personal Information' section.

I agree to the CTF/Junior ISA terms and conditions.

Signature of applicant

Date