

Investment Bond Application

Personal details

You can invest on your own or jointly with another person (eg husband, wife, partner etc).

YOU		SECOND PERSON								
Title	_____	Title	_____							
Forename(s)	_____	Forename(s)	_____							
Surname	_____	Surname	_____							
Address	_____ _____	Address	_____ _____							
Postcode	_____	Postcode	_____							
Telephone	_____		_____							
Email	_____		_____							
Date of birth (age 18 and over)	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> [] Female [] Male					<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> [] Female [] Male				
Occupation	_____		_____							
Marital status	_____		_____							
Union/Trade Association membership (if any)	Union name _____ Member no _____		_____							

Investment details

Where you would like your money invested

Managed Fund	£ _____	<i>Minimum investment in the Teachers Assurance Investment Bond is £2,500</i> <i>Minimum investment per fund is £1,000</i>
Gilt & Fixed Interest Fund	£ _____	
Cash Fund	£ _____	

I/We enclose a cheque payable to "Teachers Assurance"

Regular withdrawals

You can use your investment bond for a regular income by taking withdrawals. Please refer to our Key Features document and the section titled "Can I take regular withdrawals from the Bond" before you complete this section.

How much can you take in regular withdrawals?

Your regular withdrawals which will be paid automatically into your bank or building society account are from the value of your Bond and are not income from the fund you invest in.

You can elect to take either a % of your initial investment or a monetary amount.

I would like to take _____ % of my initial investment or £ _____ as my regular withdrawal amount.

Investment Bond Application

When you can take withdrawals

You can opt to receive your money

Annually **Half Yearly** **Quarterly** **Monthly**

You must invest at least £2,500 in your Bond for annual and half yearly withdrawals, £4,000 for quarterly withdrawals or £12,000 for monthly withdrawals.

Please tell us when you would like to start receiving these withdrawals which are paid on the 15th day of the month(s).

Month _____ Year _____

Please provide us with details of the Bank or Building Society where you would like your withdrawals paid.

Name _____ Address _____

Post Code _____

Name of the Account Holder _____

Account Number _____ Bank Sort Code _____

If your withdrawals are to be paid into a Building Society account please advise us of the Roll Number _____

Declaration

I/We have read the Key Features Document and understand the risk reward rating for this product. I/We apply for the Bond with Teachers Assurance on my/our lives and a) declare that all the information given is true and complete to the best of my/our knowledge and belief; and b) agree that this application shall be the basis of the contract between me/us and Teachers; and c) understand that if I/we die before being accepted for the Bond any money I/we have paid to Teachers Assurance will be refunded in full.

Signature(s)

X

X

Date _____



Data Protection

Copies of the policy conditions for the plan, and of this application, are available on request.

Your information will be held by Teachers Assurance and added to our marketing databases. It may be used to keep your records up to date, for business analysis and market research purposes and to advise you by post, telephone and/or electronic methods about any products and services that may be of interest to you. We may pass your details to other carefully selected organisations but only for the purposes mentioned above.

If you do not want to receive such marketing information, please tick this box []

Subject to payment of a fee, you can ask for a copy of the personal information we hold about you by writing to the Data Protection Officer, Teachers Assurance, Tringham House, Bournemouth, BH7 7DT. For details of the Teachers group of companies, please refer to our website www.teachersassurance.co.uk.

Teachers Assurance

Tringham House, Deansleigh Road, Bournemouth BH7 7DT Tel: 01202 435000 www.teachersassurance.co.uk

Teachers Assurance is a trading name of Teachers Provident Society Limited (TPS), an incorporated Friendly Society No 372F, authorised and regulated by the Financial Services Authority (FSA). A member of the Association of British Insurers and the Association of Mutual Insurers.

The Teachers Assurance companies, which are authorised and regulated by the FSA, include Teachers Assurance Company Limited No. 314801, Teachers Financial Services Limited No. 3401635 and Sovereign Unit Trust Managers Limited No. 2072297. Teachers Management Services Limited No. 3401641 is not a regulated company.

All companies are wholly owned subsidiaries of TPS. Registered in England & Wales. To help us continually improve customer service, calls may be monitored and recorded.

Information

No advice has been offered in connection with this plan. If you would like support when completing this application form or more information about the product itself please call our Customer Support line on 0800 056 0563

Lines are open 8.30am - 8pm Monday to Fridays and 9am - 1pm Saturdays

Copy documentation

Copies of your completed application form and our Bond policy document are available on request.

Teachers Assurance

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