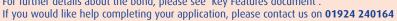
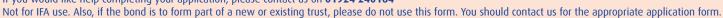
## **Investment Bond Application Form**









4 dataila					
1) your details					
First Applicant (to whom all correspondence will be sent)	Second Applica	ant (if applicable)			
Title	Title				
Surname	Surname				
Forename(s)	Forename(s)				
Address	Address (If different from first applicant)	1			
Postcode	Postcode				
Tel. No. Day	Tel. No.	Day			
Evening		Evening			
Email	Email				
Date of birth Male Female	Date of birth	Male Female			
If either applicant has been at the address(es) above for less than 3 years then please use this space to provide details of your address history for the past 3 years.					
investment details  Please note: The minimum investment into each Bond is £1,000 and the maximum is £250,000. The overall maximum you can normally invest in a calendar year into our Bonds is £250,000.  I/We wish to invest £ in the Investment Bond.  Please make your cheque payable to Kingston Unity. If you use a Building Society cheque or bankers draft, ask the organisation to print your name and account number on the reverse of the cheque and endorse it with their stamp.					
3 permission to keep you informed					
Information about you will be held by <b>Kingston Unity</b> to provide the products and services for which you apply. We would also like to keep you informed of other products and services. Please tick the appropriate boxes if you <b>DO NOT</b> wish to be sent information about our products and services by: mail phone email mail mail mail mail mail mail mail					
You can change any of your choices by calling us on <b>01924 240164</b>					
	4a complete this section if you wish to make regular withdrawals				
4a complete this section if you wish to n	nake regula	ar withdrawals			
Please refer to the "Key Features document" and in particular the					
Please refer to the "Key Features document" and in particular the How much do you want to withdraw?	section "Can I m	nake withdrawals?" before completing this section			
Please refer to the "Key Features document" and in particular the How much do you want to withdraw?  You can choose to withdraw up to 5% of the original sum invested in	section "Can I m	nake withdrawals?" before completing this section			
Please refer to the "Key Features document" and in particular the How much do you want to withdraw?  You can choose to withdraw up to 5% of the original sum invested in Fixed amount   Percentage %	section "Can I m	nake withdrawals?" before completing this section			
Please refer to the "Key Features document" and in particular the How much do you want to withdraw?  You can choose to withdraw up to 5% of the original sum invested in	e section "Can I m any policy year as	nake withdrawals?" before completing this section is a fixed amount or percentage without charge.			

bank or building society account details (Only complete this section if you wish to make regular withdrawals).				
Please provide the bank or building society account details that you would like regular withdrawals to be paid into.				
Name of bank or building society (in block capitals)				
Bank or building society address		Postcode		
Account holder's name				
Account number				
Sort code (banks only)				
Please sign your regular withdrawal authority				
I/We wish to receive a regular withdrawal from the Bond. I/We understand that any withdrawal will reduce the value of the Bond and this may be below the amount of the original investment.				
First applicant's signature 🗡		Date		
Second applicant's signature (if applicable) 🗡		Date		
5 declaration - please ensure you sign and date this section				
I/We hereby apply for the Investment Bond. I/We declare that to the best and belief the answers given above are true and complete.	of my/our knowledge	handling process on our website www.kingstonunity.co.uk and these are also available on request. In circumstances where you feel your complaint has not been dealt with to your		
The Investment Bond is subject to the Key Features document. For your you should read these carefully before signing this application form. If y any point please ask us for further information. I/We understand that a c	ou do not understand	satisfaction, or if we have not been able to give you a final response within eight weeks, then you will have the option of contacting the Financial Ombudsman Service.  Their website is www.financial-ombudsman.org.uk		
and rules is available on request.  I/We understand that under the current Money Laundering Legislatio requirements ID verification checks may take place if required, including I/We authorise such checks.		<ul> <li>Your Obligations</li> <li>To complete the application to the best of your knowledge and inform Kingston Unity in writing immediately of any changes in your circumstances</li> </ul>		
I/We declare that this application has been completed by the best of m belief. I/We agree to inform Kingston Unity in writing immediately of a details.		<ul> <li>To read the documentation that we will send to you, particularly the Key Features Document.</li> <li>Data Protection</li> <li>In order to process your application, we must obtain certain information from you. We will also</li> </ul>		
We will treat you as a 'retail customer' which means that you will receiv consumer protection available under UK financial services rules and regu		need to maintain certain other records.  • You agree that the information we hold about you can be held electronically and/or in hard copy form.		
<b>Client Agreement</b> I/We agree to be bound by this Client Agreement, which is a legal agree respective rights and obligations.	ment, and defines our	<ul> <li>You agree that any information we hold about you may be disclosed a) to third parties for the purpose of processing your application and ongoing membership, b) to our Regulators, c) to our Compliance Consultants, d) It will not be disclosed to any other parties (even if</li> </ul>		
Your Rights You will be treated fairly in all of your dealings with Kingston Unity inclue  The product and associated services will be clearly described, so that you	_	related) without your express permission in writing.  • If your plan has been arranged as an advised sale via an IFA, then we will automatically disclose your plan information to them unless you instruct us otherwise. If in future you do		
it meets your needs		not wish to give us permission to disclose your information to your IFA, or if your relationship with your IFA ceases then please advise us.		
<ul> <li>Being provided with clear and accurate information, during and at</li> <li>Our dealing effectively with your queries and complaints. We publish of</li> </ul>		<ul> <li>If you have been referred to us by an IFA then we will not provide them with any details of your plan information and we will send all documentation directly to you.</li> </ul>		
Please sign and date this declaration. If it is a joint bond, both applicants must sign and date.				
First applicant's signature X		Date		
Second applicant's signature (if applicable) X		Date		
Please complete this section if this is a non-advised sale:  Kingston Unity does not give advice in relation to its products and our external and Society introducers are not authorised to give advice. However, you may have received advice from an Independent Financial Advisor in relation to this plan. Where you have received advice from an Independent Financial Advisor, please do not complete this section.  I/We confirm that I have not requested nor received any advice from the Society or its introducers in relation to this product.  Signed:				
return to us  Please return your completed application to: Freepost RSJC-BBGE-KSAX, Kingston Unity, 9 Navigation Court, Calder Park, Wakefield, WF2 7BJ  IFA Ref/Name  How did you hear about us? IFA  KU Agent  KU Website  Other (specify)				

Kingston Unity, 9 Navigation Court, Calder Park, Wakefield WF2 7BJ. Tel: 01924 240164 email: enquiries@kingstonunity.co.uk website: www.kingstonunity.co.uk