



follow these easy steps...

- 1 Complete your details in **section 1**.
- 2 Select a payment method in **section 2**. If you want to set up regular payments by Direct Debit you will also need to complete the Direct Debit instruction form. Please note that additional incentives for Direct Debit contributions are available when they are made online rather than via this form. For more information see www.engagemutual.com/ctf.
- 3 Complete the child's details in **section 3**.
- 4 Read the Declaration in **section 4** and then sign and date the form where indicated.
- 5 Return the completed form and send it to us at the following address: **engage** Mutual Funds Limited (CTF) FREEPOST NEA4568 Hornbeam Park Avenue, Harrogate, HG2 7BR.

If you would prefer to make a gift over the telephone or if you have any questions please call us free on **0800 298 3233**.

please bear in mind the following conditions:

It's important to note that because of the Inland Revenue rules for Child Trust Funds, payments cannot be reclaimed once they have been made. Up to £1,200 may be invested in each subscription year. The subscription year runs from the child's birthday in one year to the day before their birthday the following year. Unused allowance in a year cannot be carried over.

If the £1,200 annual payment limit is reached:

- For Direct Debits, we will collect as much as we can up to the £1,200 limit and then payments will start again in the next subscription year.
- For payments by Cheque, Standing Order or Direct Credit that take payments over the limit, we may not be able to accept the payment, in which case we will return the cheque to the person who sent it. Standing order payments will be returned to the bank account from which they were received.

Any gifts made will be shown on the Child Trust Fund statement which is sent out to the child (care of the Registered Contact until age 16) each year.

Please note that this form is for the person making the gift payment

1 - your details

Title	<input type="text"/>	Surname	<input type="text"/>	Address	<input type="text"/>
Forenames	<input type="text"/>				<input type="text"/>
Date of birth	<input type="text" value="dd/mm/yyyy"/>				<input type="text"/>
Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female			<input type="text"/>
Daytime tel no.	<input type="text"/>				<input type="text"/>
Evening tel no.	<input type="text"/>			Postcode	<input type="text"/>
Completing your phone number and email address will minimise delays if we have any queries.				E-mail	<input type="text"/>

2 - payment method

For one off payments

The options are:

- Cheque** amount Please make payable to: '**engage** Mutual Assurance'
(please write the child's name and date of birth on the back of the cheque and attach to this form)
- Direct Credit*** **Standing Order***

For regular payments

The options are:

- Direct Debit Monthly**
Amount (the maximum contribution is £100) £100 £50 £30 £20 £10
- Please also select a collection date: 1st of the month 15th of the month
- Direct Debit Annually** Amount (the maximum contribution is £1200)
- Please also select a collection date: 1st of the month 15th of the month
- For Direct Debit payment you will also need to complete the instruction form below.
- Standing Order***

*If you would like pay by Direct Credit or Standing Order complete all your details and we'll send you a form in the post. For Direct Debits we will write to you with confirmation of when your first payment will be taken.

please complete the rest of the form on the next page

instruction to your bank or building society to pay by Direct Debit

Please complete and return to: **engage** Mutual Funds Limited, Hornbeam Park Avenue, Harrogate HG2 8XE.

Name and full postal address of your Bank or Building Society

The Manager Bank/Building Society

Address

Postcode

Name(s) of Account Holder(s)

Branch Sort Code

Bank/Building Society Account Number

Banks/Building Societies may not accept Direct Debit Instructions for some types of account.

Originator's Identification Number
4 1 8 4 3 2

Reference Number (for office use only)

Instruction to your Bank/Building Society
Please pay **engage** Mutual Funds Limited 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 **engage** Mutual Funds Limited, and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s) Date

For **engage** official use only. This is not part of the instruction to your Bank or Building Society

Account Holder's Address

Postcode



3 - child details

Please supply the child's name and **either** the date of birth and postcode **or** their CTF Account Number

Forename Postcode

Surname CTF Account Number

Date of birth

4 - data protection

engage Mutual Assurance may use information provided in relation to this gift to process my gift and for the ongoing management of the account. Information may be held on computer, paper file or other appropriate medium, for the life of the account and for an appropriate period thereafter.

Signed: Date:

The information you provide may be used by us to provide you with details of products and services from ourselves, associated, and non-associated companies. To do this we may need to pass your data to our subsidiary companies, and occasionally other organisations. If you would prefer not to receive these details or have your details passed on, please tick the following box

engage Mutual Assurance, Hornbeam Park Avenue, Harrogate, HG2 8XE tel: 01423 855000 fax: 01423 855181

engage Mutual Funds Limited (eMFL), Registered in England No 3224780. Authorised and regulated by the Financial Services Authority (FSA). eMFL's FSA Register number is 181487. You can check this on the FSA's Register by visiting the FSA's website www.fsa.gov.uk/register or by contacting the FSA on 0845 606 1234.

engage Mutual Investment Funds ICVC is an investment company with variable capital, Registered in England No. IC0044.

If you need help completing this form

call us today on **0800 298 3233**

Please note all calls may be recorded for security and training purposes.



Direct Debit makes paying in easy

Simply read the Direct Debit Guarantee and then fill in the Direct Debit instruction on the form. By completing the Direct Debit instruction your bank or building society can make monthly payments for you, direct from your account. This means that you don't have to worry about forgetting to make payments if you are busy or on holiday and you can check your payments on your bank/building society statement.

Direct Debit Instruction

All account details required to complete the Direct Debit instruction can be found in your chequebook.

1. Fill in the name and address of your bank/building society branch
2. Fill in the Account Name/s as printed on your cheques
3. You will find your branch sort code in the top right corner of your cheques
4. Fill in your Account Number - this is usually printed on the bottom of your cheques - the number on the far left
5. Sign and date the Direct Debit instruction
6. Account Holders Address: it is important that the address and postcode of the account holder is entered here.

If you have any questions please call 0800 298 3233.

direct debit guarantee

This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the scheme is monitored and protected by your own Bank or Building Society. If the amounts to be paid or the payment dates change, **engage** Mutual Funds Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If an error is made by **engage** Mutual Funds Limited or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid. You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us.

