

**AGENT NUMBER**

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**BRANCH NUMBER**

**CUSTOMER NUMBER**


### 1. Details of the Proposed Planholder

**Please fill in the details of person whom the plan is for:**
 Please tick here and fill in your details below if you are applying for someone else. See section 5 overleaf for further details if this applies.





Title (Mr/Mrs/Miss/Other)	Title (Mr/Mrs/Miss/Other)
Forename(s) in full	Forename(s) in full
Surname	Surname
Address	Address
Postcode	Postcode
Date of Birth:	Date of Birth:
Telephone No (inc local code):	Telephone No (inc. local code):
Email:	Email:
	Relationship to Planholder:

### 2. Your Choice of Plan and Preferred Payment Period

Choice of 3 Plans	Single Payment	12 monthly payments. There is no extra charge for 12 monthly payments
The Amber	<input type="checkbox"/> £3,495.00	<input type="checkbox"/> £291.25 for 11 months and 1 final payment of £291.25
The Pearl	<input type="checkbox"/> £3,875.00	<input type="checkbox"/> £322.91 for 11 months and 1 final payment of £322.99
The Diamond	<input type="checkbox"/> £4,135.00	<input type="checkbox"/> £344.58 for 11 months and 1 final payment of £344.62

Prices valid as at 15/12/17. Prices are subject to review by Dignity, if at the point of application the Plan price has changed for any reason, we will advise you of this before we set up your plan and there will be no obligation for you to continue.

### 3. Method of Payment

- 1 Payment by Cheque or Postal Order** (made payable to: **National Funeral Trust**)
- 2 Payment by Credit / Debit Card**     (For your security, if you want to pay this way, please write your full telephone number in section 1. Dignity's Client Service Centre will call you for your details).
- 3 Payment by Direct Debit** (please complete section below, payments are debited on the 25th day of the month, or the nearest working day after that).

We accept payment over the phone by Debit Card, Credit Card and Direct Debit.

**Link Corporate Trustees (UK) Limited  
Re National Funeral Trust:**

Please fill in the whole form using a ball point pen and send it to: National Funeral Trust (c/o Dignity), 4 King Edwards Court, King Edwards Square, Sutton Coldfield, West Midlands, B73 6AP.

**Instruction to Your Bank or Building Society  
to Pay by Direct Debit**

**Name and full postal address of your Bank or Building Society**

<b>To: The Manager</b>	<b>Bank/Building Society</b>
<b>Address</b>	
<b>Postcode</b>	
Name(s) of Account Holder(s)	
Bank/Building Society Account Number	
Branch Sort Code	

 Service user number **9 2 0 1 4 9**

 Reference 
**Instruction to your Bank or Building Society**

Please pay Link Corporate Trustees (UK) Limited Re National Funeral Trust 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 Link Corporate Trustees (UK) Limited Re National Funeral Trust and, if so, details will be passed electronically to my Bank / Building Society.

 Signature(s): 

 Date: 

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

#### 4. Choice of Funeral Type

Please indicate if you would prefer:

Cremation

Burial

Undecided

If a burial is required please note that Dignity is unable to guarantee the cost of the burial as prices vary significantly from region to region. Instead, the plan price includes a contribution of £1,220 which rises in line with inflation. You may wish to contribute an additional amount. If you require a burial, please call Dignity on 0800 484 0503 to discuss requirements. Please see the Terms & Conditions for full details.

#### 5. Signature and Date

I wish to apply for the plan as indicated overleaf and as described in the brochure provided with this application. I have read the Key Features Summary and will be subject to the Terms & Conditions provided. I understand that I can cancel my plan within 90 days and receive a full refund. If I wish to cancel my plan after this time a £395 cancellation fee will be deducted from the money refunded.

Please note, the signature below needs to be the person filling out this form, so if you are applying on behalf of someone else, please sign your name, not theirs. All correspondence relating to the plan will be sent to the address of the person signing the form.

Signature

Date

Print Name

You may obtain a copy of your personal information held by Dignity by writing to: Data Protection Officer, 4 King Edwards Court, King Edwards Square, Sutton Coldfield, West Midlands B73 6AP. A fee, not exceeding the statutory maximum, may apply.

**If you have any questions, call us FREE on 0800 484 0503 we will be happy to help**

**Please post this form to the following address (postage is paid, no stamp is required)**

**FREEPOST RSKG-TXEG-UYAT, Dignity Pre Arrangement Ltd, Sutton Coldfield, West Midlands B73 6AP.**

#### How we use your information

Once you have applied for a funeral plan, Dignity will act as an independent Data Controller and will process your personal information for the purpose of administering the funeral plan, this may involve contacting you to inform you of any relevant information in relation to your plan. Dignity will also process your information for our legitimate business purposes, which include improving our services to our customers, preventing fraud, and better understanding how our customers interact with us. Whenever Dignity uses your information for these purposes your Personal Data rights are considered carefully, and you have a right to opt-out of this processing. For more information on how we use your information, or how to opt-out, please see Dignity's Privacy Policy at [www.dignityfunerals.co.uk](http://www.dignityfunerals.co.uk).

"Dignity" is comprised of the Dignity Plc Group of companies.

#### How we share your information

As you have been introduced to Dignity by Yorkshire Building Society, we will share limited information about you with them to prevent duplicate communications, for our own business processes, and as per their legitimate interests. For further information on how Yorkshire Building Society use your information please see their privacy policy at [www.ybs.co.uk/privacy](http://www.ybs.co.uk/privacy).

Unless you have opted-out, your information will also be shared with Dignity's trusted Market Research Agencies as per our legitimate business interests. Dignity will not share your information for marketing purposes.

For further information on how we use and share your information, please see our Privacy Policy at [www.dignityfunerals.co.uk](http://www.dignityfunerals.co.uk) or request a written copy on 0800 587 2541. In accordance with our agreed practices, we confirm that Dignity will not collect future marketing consents for either Yorkshire Building Society or Dignity as part of this process.

Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Head Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ. All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard network rate as 01 or 02 landline numbers, even when calling from a mobile. Calls to 0800 numbers are free of charge from a landline or mobile. Charges to third party numbers may vary. Prices can be checked with the relevant company.

As an intermediary, Yorkshire Building Society acts on your behalf in arranging the Prepaid Funeral Plan. The Prepaid Funeral Plan is provided by Dignity Pre Arrangement Limited. A company registered in England No. 1862158. VAT Reg No. 486 6081 14. Registered Office: 4 King Edwards Court, King Edwards Square, Sutton Coldfield, West Midlands B73 6AP. Telephone No. 0121 354 1557. Fax No. 0121 355 8081. Part of Dignity Plc. A British company. Dignity Pre Arrangement Limited is regulated by the Funeral Planning Authority. Calls may be monitored or recorded for training and quality purposes. Funeral Plans provided by Dignity are not regulated by the Financial Conduct Authority.

## How Yorkshire Building Society use your personal information

Yorkshire Building Society decides what personal information we need to collect about you, how we use it, who we share it with and how long we keep it. This makes us the data controller of your personal information for data protection purposes.

We will use the personal information obtained from you and additional information obtained in the course of opening and managing your account. This includes, but is not limited to, name, address, identification, account transactions and communications and where relevant sensitive information, credit reference data, financial crime data, health details, nationality and legal proceedings.

We will respect your rights to privacy and will only collect, use, store and share your personal information where a lawful purpose applies:

- It's necessary for the performance of a contract you have or have requested to enter into.
- If we have a legal obligation
- If we have a legitimate business interest where it does not have an unfair impact on you.
- If you have given your consent where the collection, use, storage or sharing involves special category (sensitive) personal information (e.g. health, race and religion).
- Where we believe you or another person is at risk and we need to protect your or their vital interest.
- Where it's in the public interest or we have been given official authority to do so.

For full details of the types of information used in each product, and the other lawful purposes we may use it for, please see our "How we use your personal information booklet" which can found at [www.ybs.co.uk](http://www.ybs.co.uk) or by visiting one of our YBS branches or Agencies.

When you apply for a any product with us, we will use your personal information together with other information available (including relevant sensitive information, (e.g. health, race and religion) for:

- Identity verification (including checking documents with issuing authorities e.g. driving licence – DVLA).
- Processing your application.
- Contacting you where necessary.
- Fraud prevention and detection.
- Administering your account.
- Legal and regulatory compliance.
- Marketing (where we have your consent) and market research.
- General business reasons.

We will share information with one or more Credit Reference Agencies (CRA's), now and in the future, to:

- Check your identity.
- Verify the accuracy of the information you have provided.
- Manage your account(s)/relationship with us.
- Process your application.
- Ensure any offers we send are appropriate to you.
- Prevent criminal activity, fraud and money laundering.

The personal information we have collected from you will be shared with fraud prevention agencies who will use it to prevent fraud and money-laundering and to verify your identity. If fraud is detected, you could be refused certain services, finance or employment in the future. Further details of how your personal information will be used by us and these fraud prevention agencies can be found in our booklet "How we use your personal information", which can found at [www.ybs.co.uk](http://www.ybs.co.uk) or by visiting one of our branches or agencies.

Where we transfer personal information to countries outside the European Economic Area (EEA) this is always done under a contract which includes appropriate safeguards for the security and confidentiality of your personal information, with your consent, or where permitted by the Data Protection laws.

We will only use, keep and share your personal information as required to meet our legal and regulatory obligations or to deal with your enquiry, administer, and manage your accounts, products and relationship with us. After this time, we will delete your personal information in line with the requirements of the Financial Conduct Authority, Prudential Regulation Authority, Money Laundering regulations, Financial Ombudsman Service, HMRC and any other regulatory bodies.

## Disclosing your Personal Information

We may disclose your personal information with other people or organisations as follows:

- The progress of your application, including if it has been granted, to your broker, Independent Financial Adviser, professional adviser or other intermediary, if the request came from them.
- With Yorkshire Building Society and its subsidiary companies for fraud prevention, lawful purposes, account administration and for general business purposes (e.g. updating customer records, handling customer queries and complaints).
- Personal information to (i) our external auditors and regulatory bodies including the Financial Ombudsman Service, Prudential Regulation Authority and the Financial Conduct Authority, and (ii) associate companies, agents and service providers including solicitors and valuers acting for the Society, field agents, debt recovery agents, tracing agents, letting agents, brokers, printers, market research agencies and providers of information technology services.
- If we sell or transfer all or part of our business, we may share or transfer our customer records as part of the proposed/actual sale or transfer. However, we will only do so under a contract or where we have a legal obligation to do so. The protection, security and confidentiality of your personal information are important to us and we put in place appropriate safeguards to manage this.
- We may also share information about you with a joint account holder if they make an enquiry or further application without you being present where they confirm they have your authority to act on your behalf.

If you are making an enquiry or application on behalf of another person they must have authorised you to act on their behalf, to give us their personal information, to authorise a credit search if necessary and our use of their personal information.

## Your rights under the Data Protection Laws

You have the right to:

- Be informed about processing of your personal information.
- Have your personal information corrected if it is inaccurate or incomplete.
- Object or restrict to the processing of your personal information.
- Have your personal information erased subject to conditions (e.g. where the processing fails to satisfy legal requirements).
- Request access to your personal information and details about how we process it.
- Move, copy or transfer your personal information also known as 'data portability'.
- Challenge automated decision making including profiling, which is the automated processing of your personal information to evaluate certain things about you.
- Complain to the Information Commissioner's Office (<https://ico.org.uk/>) which enforces data protection laws.

For more information please see our 'How We Use Your Personal Information' and 'Your Rights and Data Protection' booklets.

Our 'How We Use Your Personal Information' booklet explains what personal information we need to collect, why we need it, where we may obtain information from and how long we keep it for.

Our 'Your rights and Data Protection' Booklet provides more information on data protection laws, our legal obligation and your individual rights in relation to the processing of your personal information.

To obtain a copy of these booklets simply visit our website [www.ybs.co.uk](http://www.ybs.co.uk) or alternatively call us on 0345 1 200 100 or visit us in branch.

Our Data Protection Officer (DPO) provides help and guidance to make sure we apply the best standards to protecting your personal information. Our DPO can be reached by email at [dpo@ybs.co.uk](mailto:dpo@ybs.co.uk) or by post at DPO, Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ.