

2120 2023 Foresters Affiliate

Donation Terms & Conditions

- Please be aware that terms and conditions apply if you choose to stop or cash-in your savings or investment plan within the first year, after the 30 day cancellation period has passed, or if the plan has no value. Please refer to the products' Key Information Document and Important Information document for further details.
- Donations are only available once per transaction.
- A donation will only be paid for purchases made from within the UK.
- A donation is only available to customers opening a new product online or starting a new investment online.
- A donation is only available to customers opening a new Tax Exempt Savings Plan, Children's Tax Exempt Plan, Savings and Investment Plan, Stocks & Shares ISA, Lifetime ISA, Junior ISA, Investment Bond or Over 50s Life Cover.
- You may get back less than you have paid in. Tax rules might change and depend on individual circumstances.
- The 50+ Life Cover policy is not a savings or funeral plan – there is no guarantee that the amount received would cover the costs of a funeral. Depending on how long you live, the total amount you pay in may be more than the amount payable on your death.
- The Savings & Investment Plan, Tax Exempt Savings Plan and Children's Tax Exempt Plan are provided by POIS, which is a part of Foresters Friendly Society.
- The donation will be rejected in the event that a customer has previously opened the same product with Foresters Friendly Society, or POIS (who are a part of Foresters Friendly Society).
- The donation will not be paid if you have previously purchased a Foresters Friendly Society and/or POIS product (POIS is a part of Foresters Friendly Society) but have since cancelled that product.
- For ISAs, Lifetime ISAs and Junior ISAs, if any combination of lump sum investment, regular contribution and transfer are set up at the same time, only the highest denomination of donation and/or vouchers will apply.
- Multiple ISA applications over any time period will be merged together and you will not receive a donation on any additional applications.
- Transfers from an existing ISA provider are accepted. Please refer to the products' Key Information Document and Important Information Document for further details.
- If a new Stocks & Shares ISA, Lifetime ISA, Junior ISA, Investment Bond or Over 50s Life Cover policy is cancelled within 12 months of commencement Foresters Friendly

Society reserve the right to deduct the value of the donation from any surrender value or refund of premiums.

- If a new Tax Exempt Savings Plan, Children's Tax Exempt Plan or Savings and Investment Plan is cancelled within 12 months of commencement. The Post Office Insurance Society (POIS) (who is a part of Foresters Friendly Society) reserve the right to deduct an exit fee charge of £125 and any remaining balance will be paid to you or to the child.
- A donation will not be paid on any top-ups made to an existing ISA, Junior ISA or Lifetime ISA.
- The donation will only be paid if your investment, or transfer, remains invested for more than 3 months.
- The donation will only be paid if your direct debit is kept up to date as per the terms of the product for which you are applying.
- A donation will not be paid if you stop paying or reduce your contributions, make withdrawals, or cancel the policy before the terms are met.
- The donation can take from 90 days up to 200 days to confirm from the date the 1st direct debit is received, or the initial investment is made, depending on the terms required to verify your transaction as detailed in the listing.
- Foresters Friendly Society and POIS (who are a part of Foresters Friendly Society) standard eligibility criteria applies.
- Your donation will be confirmed by Foresters Friendly Society and credited to your account after your payments have been made, as per the terms of the product for which you are applying.
- The donation is paid by Easyfundraising not Foresters Friendly Society. Should you have questions regarding your donation please contact Easyfundraising not Foresters Friendly Society.
- Donation amounts are subject to change, both up and down, without notice and entirely at the discretion of Foresters Friendly Society.
- A "Missing Donation" query must be submitted within 30 days of the transaction if the transaction does not track automatically.
- Foresters Friendly Society will only look into donation queries submitted within 12 months from the original application date of the savings/investment plan.
- If you generate a fraudulent transaction your donation will be reversed, and your account removed immediately. We actively monitor for fraud and will report fraud to the relevant authorities if appropriate.

- Members should only use voucher codes listed on Easyfundraising. If you use voucher codes or gift vouchers that are not listed on Easyfundraising your donation may not track or be declined.
- Make sure you have third party cookie tracking enabled and you allow the confirmation page to fully load before closing the window and finishing your application.
- You must use the link above to purchase directly to qualify for a donation.
- Cannot be used in conjunction with any other offer.
- This offer may be withdrawn at any time.