

Can't apply online?

If you'd like an information pack and application for our adult ISA posted to you:



call us free on **0800 585 625***, or



fill in the coupon below and return it to us in an envelope addressed to **Freepost SF INVESTMENTS** (no stamp required).

* Calls are free from a UK landline

BLOCK CAPITALS PLEASE

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐

Forename(s)

Surname

Address

Address Postcode

Date of Birth (18 years or over) - -

E-mail

We would like to email you with details of Scottish Friendly products and news. Please tick here if you **are happy** to receive these emails. ☐

We treat your data with respect and you can see our privacy policy at www.scottishfriendly.co.uk/privacy-policy
We will use the personal information supplied above to send you an information pack by post.

We may also use your data to contact you by post with details of other Scottish Friendly products which may be of interest to you. Please tick here if you **are not happy** to receive these. ☐

www.scottishfriendly.co.uk

Did you know we also offer an Investment Junior ISA?

We'll pay in a one-off £50 payment!*

If you have children, you could give them a head start in adult life with the "Best Junior ISA Provider", an award we won for the third year running, at the Investment, Life and Pensions Moneyfacts Awards. Investments start from £10 a month or £50 lump sums.

Keep in mind stock market investments can go down as well as up so your child could get back less than you've invested.

A £50 exit fee applies within the first 5 years.



*For Terms & Conditions and to find out more visit:

www.scottishfriendly.co.uk/best-jisa-provider



www.scottishfriendly.co.uk

Did you know you can have more than one ISA?



Invest from £10 a month or more

£50 My Rewards high street gift voucher when you start investing



You can have an Investment ISA as well as your Cash ISA

Did you know that you can invest in an Investment ISA in the same tax year as saving in a Cash ISA? An Investment ISA (also known as a Stocks & Shares ISA) isn't just for people with lots of money to put aside either. At Scottish Friendly we offer an Investment ISA to suit everyone's budget.

An investment for everyone, from just £10 a month

Everyone can invest in our ISA, starting from an affordable £10 a month. Remember that's on top of anything you save in a different type of ISA, with another ISA provider, in the same tax year. That's as long as you stay within your £20,000 annual allowance. Which let's face it, isn't hard for most of us.

Flexible payment options

With life a little unpredictable at the moment, we understand that you may need to change the way you manage your money. Our Investment ISA gives you the flexibility to pause or decrease your payments should you need to, and restart or increase them should you find you have some more money in your pocket.

Try our online tool to see how your money could grow



Why not visit our website and try our interactive projection tool? Select your preferred premium and term to see how much your money could be worth in the future.

Scottish Friendly Asset Managers Limited, Galbraith House, 16 Blythswood Square, Glasgow G2 4HJ. Authorised and regulated by the Financial Conduct Authority. Details can be found on the Financial Services Register – Registration No. 188832. Member of The Investment Association.



Features of our Investment ISA

- Low start investment, from just £10 a month.
- Flexibility to pause, restart, increase, or decrease monthly payments.
- An investment for at least 5 years, but ideally 10 or more.
- Give your money access to the growth potential from a mix of investments.
- The value of your ISA can fall as well as rise depending on the performance of your investments and you could get back less than you have invested.
- If you cash in before the end of 5 years, a £50 deduction will apply.
- Your investment grows free from income and capital gains tax (other than tax on dividends from UK shares).
- Tax treatment depends on individual circumstances and can change in the future.

>>FAST TRACK>> your way to a £50 welcome gift

Enter your >>FAST TRACK>> code on our website homepage or My Plans mobile app, to be taken to our Investment ISA which offers you a £50 My Rewards gift voucher, when you start investing. This voucher can be redeemed for gift cards from a wide range of high street and online retailers. Gift terms apply. No cash alternative is available and Scottish Friendly reserves the right to alter, cancel or withdraw the offer at any time without prior notice. Please visit our website for more details.

Get started in 3 easy steps:

1. Go to www.scottishfriendly.co.uk or Download and open the **My Plans** mobile app
2. Look for the >>FAST TRACK>> panel
3. Enter code **XXXXXXX** to make sure you are taken to our Investment ISA offering you the £50 My Rewards gift voucher.



Why choose Scottish Friendly?



Scottish Friendly is proud to be one of the largest mutuals in the UK looking after assets worth more than £5 billion (as at 29/4/21).



Scottish Friendly has been helping customers invest for over 150 years.



Scottish Friendly has won "Best Mutual Insurer" at the CFI.co UK awards for the last three years running.



Rated 'Great' on Trustpilot by our customers as at 8/11/21.

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