

## 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   -   -

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](http://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](http://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.



'Best Junior ISA Provider' 2019 - 2021



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

[www.scottishfriendly.co.uk/best-jisa-provider](http://www.scottishfriendly.co.uk/best-jisa-provider)

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## Looking to invest with some certainty?

Our Investment ISA gives you a guarantee on your 10 year anniversary as well as growth potential



£50 My Rewards gift voucher when you start investing



Scottish Friendly

# Invest with a guarantee offering some peace of mind

It's important to make the most of your money and to put what you can away for whatever the future might bring. Our Investment ISA (also known as a Stocks & Shares ISA) can give you some peace of mind, because you are guaranteed (assuming you don't withdraw or switch money out of the fund) to get at least as much as you've paid in back on your 10th anniversary of investing. And you get access to the stock market, which has the potential to make your money grow.

## Enjoy control over payments

Enjoy investing from just £10 a month or more knowing you can easily pause or decrease your payments should you need to, and restart or increase them if you find you have some more money in your pocket. You can also invest lump sums from £100 or a combination of both. That's in addition to anything you may already save in a different type of ISA with another ISA provider, as long as you don't go over your annual ISA allowance of £20,000.



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.

NSCSINB 0122



## Features of our Investment ISA

- Flexibility to pause, restart, increase, or decrease monthly payments.
- An investment from just £10 a month for at least 5 years, but ideally 10 or more.
- Access the growth potential from a mixed managed fund investing in the stock market, property, cash and bond assets.
- The value of your ISA can fall as well as rise depending on the performance of your investments. So, you could get back less than you have invested, except on the date of your 10 year anniversary as detailed next.
- Guarantee to get back at least as much as you have paid in on your 10 year anniversary, provided you make no switches or withdrawals.
- 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](http://www.scottishfriendly.co.uk)  
or  
Download and open the **My Plans** mobile app
2. Look for the >>FAST TRACK>> panel
3. Enter code **XXXXXXXX** 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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