

Golden Charter Funeral Plans

Application Form APP204-0419

Prices applicable from 1 April 2019

FUNERAL PLANS FROM
Golden Charter
Smart Planning for Later Life



The Simple Way From **£3,495**
The Traditional Way From **£3,850**
The Exclusive Way From **£4,099**

Presented by

The plan prices shown are standard prices available in most areas of the UK. In a few areas plan prices may vary. We will advise you of any variance that applies before processing your application.

PLEASE COMPLETE THIS FORM CLEARLY IN BLOCK CAPITALS AND ENSURE RELEVANT SECTIONS ARE COMPLETED

1 Plan Holder (The Member)

Date of Birth: First Name(s):
Mr/Mrs/Ms/Other: Surname:
Address:
 Postcode:
Telephone No(s):
Email:

2 Plan Holder's Next of Kin / Executor (please specify one person only)

If you are also the Representative on the plan then please tick this box (only tick this box if you are taking out the plan for someone else)

Mr/Mrs/Ms/Other: First Name(s):
Relationship: Surname:
Address:

Postcode: Telephone No(s):
Date of Birth: Email:

3 Plan Holder's Representative

Only complete this section if you are taking out the plan for someone else. We will ensure all future correspondence is sent to you. Please note where the fixed monthly payment option is selected, Phoenix Life Limited will contact the plan holder to confirm Direct Debit details only. The Plan Holder can find details of how we manage their personal information at goldencharter.co.uk/privacy-policy

The funeral director should not be named as the Representative unless specifically requested by the Plan Holder.

Please tick this box to confirm you have the Plan Holder's permission to pass their personal information to us and take out a plan on their behalf.

Mr/Mrs/Ms/Other: First Name(s):
Relationship: Surname:
Address:

Postcode: Telephone No(s):
Date of Birth: Email:

FOR OFFICE USE ONLY

GC SP-GC IN-GC FP-PX

Plan Number:

Seller ID:

4 Plan Prices

(please tick box)

The Simple Way	From £3,495	<input type="checkbox"/>
The Traditional Way	From £3,850	<input type="checkbox"/>
The Exclusive Way	From £4,099	<input type="checkbox"/>

5 Personalisation Option (Additional services and prices, if applicable)

Funeral Director's Services For example: additional costs for differences in local or regional funeral directors' fees, limousines, viewing arrangements, casket/coffin prices.	£
	£
	£
	£
	£
	£

Additional Third Party Costs For example: costs of religious service, interment of ashes, local or regional differences in cemetery or crematorium fees.

	£
	£
	£
	£
	£
	£
	£
	£
	£

6 Optional Guarantee for Third Party Costs

For an additional £200, guarantee that third party costs will be covered if the Plan Holder dies within five years of the plan being fully paid. This option is not available for burial or if you are paying by low cost instalments or fixed monthly payments. Please tick the box if you would like to opt in to the five year guarantee.

7 Total Plan Price

Each plan price in Section 4 includes an allowance of £1,100 towards third party costs.
See terms and conditions.

Price of plan selected in Section 4:	£	BOX A BOX B BOX C BOX D BOX E
Total price of personalisation option items (5):	£	
Five year plan guarantee (6):	£	
Funeral director arrangement fee:	£	
Total Amount Payable for Payment in Full: (Box A + Box B + Box C + Box D)	£	

8 Funeral Details

Funeral type
(please tick box):

Burial

Cremation (see burial/cremation information in brochure)

Service at crematorium or cemetery chapel

Service or ceremony before crematorium/cemetery

Place of worship:

Crematorium:

Disposal of ashes:

Coffin type:

Urn type:

Selected funeral director:

9 Grave Details

The purchase of the plot is not included within this plan. If you wish to purchase a plot then this will be done separately.

Name of cemetery:

Certificate No:

Class:

Grave/Lair No:

Section:

Memorial on grave?:

Yes

No

If yes - What type of memorial?

10 Additional Information

Please provide any additional information, e.g. choice of music, readings, special instructions, etc.

You can add more information at any time

Please continue on a separate sheet if necessary.

11 Client Declaration

In this application form you may supply us with information that is classed under data protection laws as sensitive, such as race, religion, medical conditions or information relating to a child. This information may be processed to provide you with the services you need. We may share your information with your funeral director. You can withdraw your consent for the use of this data at any time.

I accept the current Golden Charter Funeral Plans Terms and Conditions.

Signature of Plan Holder
or their Representative:

Date:

12 Funeral Director Declaration

I, the selected funeral director, confirm that I accept the Golden Charter Funeral Plans Terms & Conditions and have checked and agreed the arrangements and costs detailed herein.

Funeral Director's
Signature:

Print
Name:

Date:

Arranged by:
(If different
from above)

Print
Name:

ID:

13 Keeping In Touch

Golden Charter may from time to time provide you with updates to ensure you always have the best information we can provide. We value your privacy and will always handle your personal data in accordance with our privacy policy which can be viewed here: goldencharter.co.uk/privacy-policy. You may contact us at any time by calling 0800 833 800 or emailing contact@goldencharter.co.uk to let us know if you would prefer not to be contacted by us or if you have any queries about the use of your data.

Methods of Payment

Please call us on **0800 833 800** if you require assistance to complete this section.

Please make all cheques payable to 'Golden Charter Trust'

14 Payment in Full

I enclose a cheque for the **full amount** to the value of

£

OR I wish to pay by debit/credit card and have completed Section 17 for the **full amount** to the value of

£

15 Payment by Instalments

We offer two options for paying by instalments: spreading the cost of your plan over 12 months at no additional cost, or paying for your plan over any period between two and 30 years, depending on your age when we accept your plan, with our low cost instalments.

Please refer to the separate 'Payment Information Sheet' for details of payments when choosing to pay by 12 monthly payments. For more information on our low cost instalments, please contact your local independent funeral director or call **0800 833 800**.

The minimum deposit for paying by 12 monthly payments and the low cost instalments is £49. Please refer to the terms and conditions for further information.

Deposit: £49 Other £

Please select payment method for your deposit: Debit/credit card (Please complete section 17 below)

OR cheque (Please make cheque payable to 'Golden Charter Trust')

Number of years over which you wish to pay for your plan (1-30):

Monthly instalments of £

Please complete enclosed 'Payment by Instalments Direct Debit Mandate'. Direct Debit payments will be collected on or immediately after the 28th of each month.

16 Payment by Fixed Monthly Payments

Please complete enclosed 'Payment by Fixed Monthly Payments Direct Debit Mandate' for the fixed monthly payment amount of:

£

(Please refer to separate 'Payment Information Sheet' for full information)

You will receive notification of the date your monthly payment will be taken once your plan has been processed. Payments are made to Phoenix Life Limited.

17 Payment by Debit / Credit Card

Payment in full or Pay deposit for instalments

Pay by debit card:  Maestro  VISA DEBIT Visa Debit  VISA Electron

Please insert the amount you are paying by debit or credit card here: £

Pay by credit card:  VISA Visa  MasterCard

Name on card:

Card number:

Valid from: Expires: 1 or 2 digit issue number (if applicable): 3 digit security code (on reverse of card):

Signature:

Date:



Golden Charter Limited is a Registered Provider of Funeral Plans and complies with the Rules and Code of Practice of the Funeral Planning Authority (www.funeralplanningauthority.com). Phoenix Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.