

Important information about us

We are required by insurance legislation applicable throughout the European Union to provide you with the following basic information about us.

Other important information is contained within the Key Information Document for the individual saving, investment or insurance Plan you are interested in taking out.

Shepherds Friendly is a trading name of The Shepherds Friendly Society Limited which is an incorporated Friendly Society under the 1992 Friendly Societies Act No. 240F. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. FS Registration Number 109997.

Our Head Office address is Haw Bank House, High St, Cheadle, Cheshire, SK8 1AL and is based in the United Kingdom.

The law applying to your relationship with us will be the law of England and Wales.

Each year we publish a Solvency and Financial Condition Report on our website.

The Key Information Document mentioned above provides you with factual information about the Plan you are interested in and the nature of the commitment you are entering into if you take the Plan out. It is very important that you read the Key Information Document.

If you do take out the Plan, you have a “right to cancel period” of 30 days during which you may cancel the Plan without penalty.

When you take out a savings or investment Plan with us, your capital is at risk and you may get back less than you have put in. All references to taxation are to UK taxation and are based on Shepherds Friendly Society's understanding of current legislation and H M Revenue and Customs practice which may change in the future. For our With Profits plans investment growth is by means of bonuses, the amount of which cannot be guaranteed throughout the term of the Plan.