

Switch form – change Ringfenced Investments to Lifetime Investments

How to fill out this form

Please use black ink and CAPITAL LETTERS or tick ☒ as necessary.

Any corrections must be initialled; do not use correction fluid.

About this form

Please complete and sign this form if you want to switch some or all of your Ringfenced Investments into Lifetime Investments. If you are not sure of the percentage of Ringfenced Investments you currently hold, please call us on 0845 075 7576 between 9am and 5pm Monday to Friday. Calls may be monitored or recorded for quality and security purposes.

Please complete both part 1 and part 2 of the form and return it to:

Flexible Retirement Income Servicing Team
Prudential
Lancing
BN15 8GB

Part 1 – Personal details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Ms ☐ Other please state)

Surname

Full Forename(s)

Policy Number

Address

Postcode

Please state what percentage of your Ringfenced Investments you would like to retain after making the switch to Lifetime Investments.

 %

Notes

- You should consult your Financial Adviser before making any investment decisions.
- The instruction to switch investments will normally be carried out on the monthly policy anniversary following the day on which we receive your instruction. If we receive the instruction on a day when we are not open for business, we will treat it as being received on the next working day.
- Ringfenced Investments receive no Lifetime Bonuses. Any ringfenced fund remaining will provide an income for your chosen beneficiaries if you die within 10 years of setting up your Flexible Lifetime Annuity, for the remainder of the first 10 years.
- If you choose to have no ringfenced investments left at all, this will remove any temporary income which would be payable in the event of death within 10 years. The only death benefit payable would be any joint life benefit, if selected.
- Lifetime Investments are eligible to receive Lifetime Bonuses, but they are lost when you die (or, in the case of a joint life annuity, when both annuitants die).
- Income is automatically taken from Ringfenced Investments before any Lifetime Investments are used.
- Once Ringfenced Investments have been switched into Lifetime Investments they cannot be changed back again.

Part 2 – How we use your personal information

For a copy of our latest Data Protection Notice, please visit www.pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing, BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

Part 3 – Declaration

I authorise Prudential to retain the percentage of my Ringfenced Investments shown above, after making a switch of Ringfenced Investments into Lifetime Investments.

I understand that following the switch, my beneficiaries may receive a reduced benefit or, in some circumstances, will not receive any benefit at all. Prudential will confirm in writing that my instructions have been carried out and the date from which the changes have taken effect.

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---