



Transfer-In Authorisation – Flexible Lifetime Annuity and Flexible Income Drawdown Plan

Please use black ink and write in CAPITAL LETTERS or tick as appropriate. Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

About this form

Please complete this form if the member is transferring his/her pension plan into Prudential's Flexible Income Drawdown Plan or Flexible Lifetime Annuity. This should not include the value of any Protected Rights or any Guaranteed Minimum Pension.

This form must be completed by the transferring scheme trustees or administrator. For individual policies it should be completed by the insurance company.

Please complete the form carefully and fully, otherwise delays in processing may occur.

The Prudential Flexible Retirement Income Account is a Personal Pension Scheme established by The Prudential Assurance Company Limited and is a UK Registered Scheme. The Prudential Assurance Company Limited is the Scheme Administrator and Provider and agrees to administer the Scheme in accordance with the rules.

Once completed please return this form to:

Flexible Retirement Income Servicing Team, Prudential, Stirling FK9 4UE

Part 1 – Member details

Illustration number

Title

Mr

Mrs

Miss

Ms

Other

Surname

Forename(s)

Date of Birth

D	D	M	M	Y	Y	Y	Y
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Gender

Male

Female

Current Address

<input type="text"/>
<input type="text"/>
Postcode

National Insurance Number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Part 4 – Additional details

Please confirm:

- a) The amount of the transfer value (if any) which has previously been taken into account for the purpose of calculating any tax-free cash
If none, please state: "nil"
- b) Is the transfer the result of a divorce "pension splitting" order? Yes No
- c) Does the investor qualify for Protected Tax Free Cash for pre 6 April 2006? Yes No
- d) Protected Tax Free Cash amount at 5 April 2006
- e) Fund Value at 5 April 2006

Part 5 – Declaration

We confirm that:

- ▶ The information given by us is correct and complete.
- ▶ A cheque is enclosed for the transfer value.

For and on behalf of the scheme trustees or administrators.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Name

Contact Telephone number

Cheques should be made payable to The Prudential Assurance Company Limited.



www.pru.co.uk

Prudential is a trading name of The Prudential Assurance Company Limited, of Prudential Annuities Limited and of Prudential Retirement Income Limited. This name is also used by other companies within the Prudential Group, which between them provide a range of financial products including life assurance, pensions, savings and investment products. The Prudential Assurance Company Limited and Prudential Annuities Limited are registered in England and Wales. Registered Office at Laurence Pountney Hill, London, EC4R 0HH. Registered numbers 15454 and 2554213 respectively. Prudential Retirement Income Limited is registered in Scotland. Registered Office at Craigforth, Stirling FK9 4UE. Registered number SCO47842. Authorised and regulated by the Financial Services Authority.

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