



Personal Pension questionnaire

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

* The government has announced that with effect from 6 April 2012 the rules on the type of pension annuity you can buy with Protected Rights funds will no longer apply.

About this form

This form should be completed if your client is using the open market option to buy a Flexible Lifetime Annuity.

Please arrange for your client's Personal Pension provider to supply the following information in connection with your client's application to use the open market option to buy a Flexible Lifetime Annuity with Prudential. Please note we cannot accept any Protected Rights* payments.

Illustration number:

Part 1 – Personal Pension Plan details

Policyholder's name

Name of Personal Pension Plan

Policy number

HM Revenue and Customs reference number of Personal Pension Plan

Please confirm the percentage of the Lifetime Allowance which the total benefits represent

 %

continued overleaf >

Part 2 – Declaration

- › We confirm that we have paid a tax-free cash amount (where appropriate) to the policyholder and that the fund is not subject to any HM Revenue & Customs regulations which would prohibit Prudential from using it to provide a Flexible Lifetime Annuity payable under the rules of the Personal Pension Plan mentioned above.
- › We confirm that we have already paid any tax liability relating to unauthorised payments and the Lifetime Allowance tax charge, if applicable, and confirm that Prudential has no tax liability in these areas.
- › We agree that if at any point in the future it is discovered that the information provided is wrong, Prudential may amend or cancel the policy.
- › We confirm that the benefits shown within the accepted quotation are allowable under the scheme rules.

For, and on behalf of, the Personal Pension provider

Signature

Date

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Name

Personal Pension provider

Contact telephone number

Address

Postcode



www.pru.co.uk

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