Retirement has more potential with PRUDENTIAL

Adviser information form

Flexible Lifetime Annuity and Flexible Income Drawdown Plan

About this form

Please use this form to provide us with your details. The completed form should be returned with your client's personal application form(s) to:

Prudential, Stirling FK9 4UE.

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 form.

If you have any queries regarding your client's application, please contact us on 0845 075 7576 Monday to Friday, between 9am and 5pm.

Calls may be monitored or recorded for quality and security purposes.

Part 1 – Client details

Client's Name

Date of birth

D D M M Y Y Y Y

Illustration number

Part 2 – Transfer follow-up service

Prudential offers a free service which liaises with ceding companies on your behalf to smooth the progress of the transfer of your client's purchase money.

Once you have made the initial request to the ceding company to transfer the pension fund to Prudential, we will regularly monitor the case from initial acceptance until the monies have been received, keeping you informed throughout the process. If you would like more information please contact us on 0845 075 7576 Monday to Friday between 9am and 5pm. Calls may be monitored or recorded for quality and security purposes.

Note: We reserve the right to withdraw this service on any particular case if we think the timescales are becoming unreasonable, however we will call you beforehand to discuss the matter further.

Please tick here if you would like to take advantage of this service. ☐

continued overleaf

Part 3 – Adviser details

Adviser Name

Daytime Telephone Number

Company Name

Company Address

Postcode

FSA Registration Number

Prudential Agency Number

Initial Commission %

Further (Trail) Commission %

Prudential pay Flexible Lifetime Annuity and Flexible Income Drawdown Plan commission via BACS.

Please note we will only be able to pay the commission if we have the appropriate bank account details.

Please give the address to which commission statements should be sent if different from above:

Address

Postcode

Name

Signature

✗

Date

D D M M Y Y Y Y

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www.pruadviser.co.uk

ANNF0183 10/2008