



Transitional arrangements

- Cut off dates for new business in PruFund Protected Growth in FIP and PIP and new business and top-ups into PruFund Investment Plan
- New Business online submissions (PruFund Investment Plan and the PruFund Protected Growth fund in FIP and PIP)

1. Cut off dates for new business in PruFund Protected Growth fund in FIP and PIP and new business and top-ups into PruFund Investment Plan

Illustrations:

The last date for all illustrations is **Friday 10 July**.

2. New Business submission (via paper):

Advisers have until Close Of Play (COP) Friday 31 July to submit completed applications and all outstanding requirements including payment. After this date the PruFund Investment Plan will be closed to new business and top-ups. Also, the PruFund Protected Growth fund in FIP and PIP will be closed to new business (the contractual rights of existing customers already in these funds are unaffected by this announcement).

To clarify this, all outstanding requirements include:

- a fully completed application form
- the payment
- any other forms that may be needed such as trusts, CVI (client verification of identity), Power of Attorney etc

All requirements need to be received into our Craigforth office by COP **Friday 31 July**.

Important: new business must be received by COP 31 July. We will be unable to process any exceptions so please do work with your Advisers to ensure this cut off date is met.

3. New Business online submission:

The PruFund Investment Plan and the PruFund Protected Growth fund in FIP and PIP will not be available online after **Friday 10 July**. Therefore, the last date for both illustrations and new business submission online is Friday 10 July. If a case has been submitted online either on or before COP Friday 10 July, any additional items e.g online declaration, cheque etc must be received in our Craigforth office by COP Friday 31 July.

Important: all of our pre-sale literature will be updated with effect from 13 July as highlighted above. Advisers are responsible for ensuring that his/her client is in possession of a valid illustration and correct pre-sale literature to ensure a compliant sale.