

Part C – Regular contributions

Additional regular contributions will be paid monthly or yearly, on the basis for current contributions, with investment in the same fund(s) as currently apply to the plan shown in part B.

If existing plans for the member do not have automatic increases, you can choose any increase rate. If you choose automatic increases for the first time, this will apply to the total contributions (new and existing) to the Scheme for the member. If there is already automatic increases for the member, this will apply to the new contribution. Automatic increases will not operate in the first six months after the start of contributions in respect of this application, but otherwise will apply on each scheme review date.

When do you want the increase in contributions to start?

Month	Year

Additional regular contribution

Payable by the employer £

the member £

Do you want contributions to increase automatically each year?

Yes No

If Yes, by what rate?

% p.a.

or NAE (tick)

*Whole number –
Minimum 5%/Maximum 15%*

If a single contribution is to be paid for the member, please complete parts D to F, otherwise go straight to part F.

Part D – Single contribution

Please use the separate Premier Transfer Plan (GMPP/EPP) Application for a transfer payment from other pension arrangements.

Total single contribution £

Member's contribution, if any, included in the above single contribution £

Part E – Investment of single contribution

If you do not complete this section we will invest your contributions in the default investment fund.

Please refer to the Guide to Fund Options for more information on the funds, the associated risks and the charges.

If you want the Lifetime Investment Option (see below), you can also choose the investment linked fund(s) to be used initially, or you can leave the selection to us.

If you do NOT want the pre-selected funds for the Lifetime Investment Option, please complete the table below to confirm the investment fund(s) to be used.

If you want the Pension Protector Option (see below), you must choose the investment fund(s) to be used.

Chosen Funds	Single Contribution: % to be invested in each fund
	%
	%
	%
	%
	%
	%
Total	100%

If you want the Pension Protector Option OR the Lifetime Investment Option, please complete the rest of this part. Otherwise, please go to part F now.

If you invest in the With-Profits Fund an MVR may be applied if you subsequently switch to another fund. This will have the effect of reducing your fund value.

Pension Protector/Lifetime Investment Options

Lifetime Investment (Cautious)	<input type="checkbox"/>	Lifetime Investment (Opportunity)	<input type="checkbox"/>
Lifetime Investment (Balanced)	<input type="checkbox"/>	Pension Protector Option	<input type="checkbox"/>

If you want to choose the initial funds under the Lifetime Investment Options, please complete the table above.

If you do not choose any of the above Lifetime Investment Strategies, we will assume that you are happy to start with the funds we choose for you.

Please now go to part F.

Part F – Trustees' declaration

We declare that, to the best of our knowledge and belief, the information on this form is true and complete.

We request that the benefits for the member be increased in accordance with this application.

Signed for and on behalf of the Trustees

X

Date

D	D	M	M	Y	Y	Y	Y
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Please show the percentage investment split you want for the single contribution. Fractions of 1% should not be used. You can invest in up to six funds for each total single contribution. The With-Profits Fund is not available for new or additional investment if the member is within three years of Normal Retirement Date (and, if chosen, would be treated as an application to invest in the Cash Fund).

Please make sure your total equals 100%.

These options do not apply to With-Profits investments.

Please tick only one option to apply for new Single Contribution(s).

If you also want these options added to your existing contributions, please complete an Investment Alteration Request (P863).

For Completion by Financial Adviser

1. Source of funds for this investment (e.g. a UK bank account)

Source of wealth – (Origin of funds for this investment e.g. employer contribution, trustee bank a/c. If other, please give detail)

2. Commission Instructions for Single Contributions

Please tick only one of the boxes below to confirm your commission basis. Please then complete the amount of commission in the right hand boxes. For initial commission, this should be expressed as a flat percentage.

Example:

Initial %

Single Contributions

		% to be taken	
a) Initial	<input type="checkbox"/>	<input type="text"/>	%
b) Fund related	<input type="checkbox"/>	<input type="text"/>	%
		Initial	Fund related
c) Mixed Initial/Fund	<input type="checkbox"/>	<input type="text"/> %	<input type="text"/> %
d) Nil Commission	<input type="checkbox"/>		

Was advice given? Yes No

Name in block capitals

Position in firm

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Please complete only one option from a) to d) opposite.

For Prudential Use Only

Cheque Acknowledgement Number

Cheque Amount £

Date Stamp

SD Agreed by

www.pru.co.uk

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