

# HODGE LIFETIME APPLICATION FOR GUARANTEED PENSION ANNUITY

HARGREAVES  
LANSDOWN

Trustee/administrator section

## Member information

Member name:

Quotation number:

## Scheme information

Name of scheme or arrangement:

Name and address of administrator or insurer:

Email address of administrator or insurer:

Pension scheme tax reference number:

R

## Transfer/Purchase amount

What is the total purchase amount?

£

Has any tax-free cash already been paid?

Yes

How much? £

£

No

## Divorce

If the member has been divorced, is there an earmarking/attachment order in force?

(Not applicable if this application relates to a pension credit) If Yes, please supply a copy of the order with this application.

Yes

No

## Payment method

How is the payment being made? (Bank transfers are preferred)

Bank transfer

Cheque

Account name: Hodge Life Assurance Company Ltd

Sort code: 30-00-02, Account Number: 00707517.

on date:

D D M M Y Y

Please use the quotation number as a reference.

## Declaration

I/We declare that the information on this form is correct.

I/We have read the important notes opposite.

On behalf of the trustees or administrator of the originating scheme or contract:

Signature: X

Date: X

D D M M Y Y

Once completed, please email this form to [retirementservice@hl.co.uk](mailto:retirementservice@hl.co.uk).

## IMPORTANT NOTES

- Hodge Lifetime will set this annuity up as a Lifetime Annuity. They cannot provide a Scheme Pension.
- The annuity will start from the date the final funds are received. They cannot provide an annuity with a backdated start date.
- The annuity will be set up in the name of the individual scheme member. The policy cannot be in the Trustee's name.
- Funds must be sent as an Open Market Option after any tax-free cash lump sum has been paid. Hodge Lifetime cannot accept the funds as an Immediate Vesting Personal Pension transfer and cannot pay a tax-free cash lump sum.