

Application for Retirement Advantage Lifetime Annuity Trustee/Administrator Section

Retirement Advantage quotation number to which this application refers _____

Member's name: _____

Is this: Open Market Option (OMO) Transfer to Retirement Advantage

About the scheme from which monies will be paid

Name of scheme or arrangement	Name and address of administrator or insurer
_____	_____
HMRC registration number for scheme □ □ □ □ □ □ □ □ R □	_____
	Postcode _____

For OMOs only (not applicable to transfers)

In whose name will policy be issued? Annuitant

Is there a required start date for the annuity? No Yes If yes enter start date _____ / _____ / _____
(See www.hmrc.gov.uk/manuals/rpsmmanual/RPSM11102050.htm)

What is the percentage of the standard lifetime allowance used up by this benefit? _____ %

Do the scheme rules impose a maximum on the amount of pension income to be provided? No Yes
If 'yes', what is the maximum annual pension income at today's date? £ _____ (each year)

What is the maximum annual pension income for a spouse, registered civil partner or dependant at today's date? £ _____ (each year) N/A

About the transfer or purchase amount

What is the total transfer value or purchase amount?	Of this, how much is in relation to 9(2b) Rights (money purchase)?
£ _____	£ _____

Has any tax-free cash already been paid?
No Yes if 'yes' how much £ _____

About the pension and divorce

If the member has been divorced, is there an Attachment Order in force?
(not applicable if this application relates to a pension credit)

No Yes if 'yes' please supply a copy of the attachment order with this application

Payment Method

How is the payment being made to Retirement Advantage? Direct credits are preferred
Cheque By direct credit on _____ / _____ / _____

Declaration – to be read and signed by the trustee or administrator of the originating scheme

A – all applicants

We declare that the information provided is true and complete (including that in the member's section where the declaration at the end of that section has not been signed by the annuitant) to the best of our knowledge. Where the member's section has not been signed by the applicant, we declare that the member's benefits are within their lifetime allowance, or that any lifetime allowance charge has been calculated and paid by us and no further charge is due.

B – Only applicable to applications relating to the open market option

We understand that the full terms and conditions of the policy(ies), a copy of this application form and a copy of the chosen quotation(s) will be available to the owner of the policy(ies).

Where the annuity is to be paid directly by Retirement Advantage to the annuitant, we authorise and request Retirement Advantage to deduct any tax due from the annuity in accordance with instructions from the appropriate Inspector of Taxes, and to account to the Inspector of Taxes for any tax so deducted.

We declare that the information given complies with the provisions of the scheme or policy from which the purchase amount has arisen.

Where the policyholder is the trustee or administrator, we declare that the trustee or administrator of the pension scheme or policy is responsible for ensuring that (where applicable), scheme maximum benefit limits are not infringed.

We agree that where the policyholder is the annuitant, Retirement Advantage's liability is limited to the annuity that will be bought and that if any further liability arises then that remains with the trustee or administrator.

We confirm that our scheme or policy has been registered with or approved by, HM Revenue & Customs under the reference number quoted.

If available, we have paid any cash sum required by the annuitant and understand that Retirement Advantage will not pay any part of the purchase amount in cash form.

We request or acknowledge that Retirement Advantage pay an annuity to the scheme member or policyholder on the basis set out in this application form and in the chosen quotation.

Upon acceptance of this application, Retirement Advantage agrees to pay an annuity in accordance with the basis given in this application.

On behalf of the trustees or administrators of the originating scheme or contract

Signed	Date / /
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Please return this form to Hargreaves Lansdown, One College Square South, Anchor Road, Bristol, BS1 5HL