

**Hodge Lifetime application for guaranteed pension annuity**  
**Trustee/Administrator section**

**HARGREAVES  
LANSDOWN**

**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 transfer value or purchase amount? £ \_\_\_\_\_

Has any tax-free cash already been paid? Yes  or No  If Yes, how much? £ \_\_\_\_\_

**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)

Yes  or No  If Yes, please supply a copy of the order with this application.

**Payment method**

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

Cheque  Bank transfer  on date: \_\_\_ / \_\_\_ / \_\_\_\_\_

Account name: Hodge Life Assurance Company Ltd

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

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

Signed: \_\_\_\_\_

Date: \_\_\_ / \_\_\_ / \_\_\_\_\_

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.