

## **Scottish Widows application for lifetime annuity**

### **Trustee/Administrator section**

**HARGREAVES  
LANSDOWN**

#### **Member information**

Member name: \_\_\_\_\_ Quotation number: \_\_\_\_\_

#### **Scheme information**

Name of scheme or arrangement: \_\_\_\_\_

Type of scheme: \_\_\_\_\_

Name and address of administrator or insurer:

Email address of administrator or insurer: \_\_\_\_\_

Pension scheme tax reference number: \_\_\_\_\_ R \_\_\_\_\_

#### **Transfer details**

What is the total transfer value or purchase amount? £ \_\_\_\_\_

Is this: Open Market Option  or Transfer to SW Appropriate Personal Pension Scheme

If an Open Market Option, has any tax-free cash already been paid? Yes  or No

If Yes, how much? £ \_\_\_\_\_

What is the percentage of the standard lifetime allowance used up by this benefit? (Based on the gross pension fund including any tax free cash taken): \_\_\_\_\_ %

If a transfer, is it being made as part of a block transfer? Yes  or No

If yes and the transfer payment includes a protected tax-free cash amount, please confirm:

1. The protected tax-free cash amount: £ \_\_\_\_\_
2. The value of the pension benefits to which the amount relates, as at 5 April 2006: £ \_\_\_\_\_
3. Has a contribution been paid by or on behalf of the individual from 6 April 2006? Yes  or No
4. Has a partial transfer been taken by the individual from 6 April 2006? Yes  or No   
If yes, please provide the partial transfer value taken. £ \_\_\_\_\_

#### **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: Scottish Widows plc Collection Account.

Sort code: 30-18-05, Account Number: 00014717.

Please use the Scottish Widows policy reference (which is different from the quotation reference. Please call Hargreaves Lansdown on 0117 314 1775 if you do not have this).

## Declaration

I/We declare that the information on this form is correct. I/We have read the important notes below.

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**

- Scottish Widows 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 funds are from a registered Pension Scheme (as defined in part 4 of the Finance Act 2004).
- The annuity will be set up in the name of the individual scheme member. The policy cannot be in the Trustee's name.

Contact Hargreaves Lansdown on 0117 314 1775 if there are any queries on these important notes.