

# SCOTTISH WIDOWS APPLICATION FOR LIFETIME ANNUITY

HARGREAVES  
LANDSOWN

## Trustee/administrator section

### 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

Is this an

Open Market Option ☐

Transfer to SW Appropriate Personal Pension Scheme ☐

What is the total transfer value or purchase amount?

£

If an Open Market Option, has any tax-free cash already been paid?

Yes ☐

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 ☐

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 ☐

No ☐

4. Has a partial transfer been taken by the individual from 6 April 2006?

Yes ☐

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) 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: Scottish Widows plc Collection Account.

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

on date:

D D M M Y Y

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).

Continued overleaf >

## 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

- 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.