

RETIREMENT SERVICE QUOTE REQUEST

HARGREAVES
LANSDOWN

Scheme/Member information

Full name of scheme:												
	Member details				Spouse/Partner details							
Surname:												
First name:												
Title (e.g. Mr, Mrs, Dr):												
Date of birth:	D	D	M	M	Y	Y	D	D	M	M	Y	Y
Sex:	Male	Female			Male	Female						
Marital Status:	Single	Married	Co-habiting	Divorced	Single	Married	Co-habiting	Divorced	Widowed	Civil Partnership	Unknown	
Address (including postcode):												
Member telephone number:												
Member e-mail address: Please provide for more efficient contact												
Member reference number:												

Pension Details

Total fund value:	£	(before deducting any tax-free cash)	
Is tax free cash available to the member from this fund? *	Yes	No	
If Yes, how much tax free cash should be offered to the member? 25% or Protected amount:	£		
If No, if no, please confirm the purchase fund value we should use for the quote:	£		
If the member is not entitled to take tax free cash from this plan, please confirm the reason:			
If the member is under 55 (Unless the member is entitled to take their benefits before age 55, we will be unable to issue annuity options until their 55 th birthday)	Protected retirement age	Early retirement due to ill health	Death claim
Is this member entitled to take the value of this pension within the scheme under the UFPLS rule?	Yes	No	If Yes, Single UFPLS only or Multiple UFPLS
Is this member entitled to take the value of this pension as a lump sum under the small pots rules? (Applicable when member is over 55 and fund is under £10,000)	Yes	No	
Do your scheme rules permit a full fund transfer? **	Yes	No	
Is an annuity the only option for the member?	Yes	No	

We will assume the following defaults unless you clearly state otherwise in the notes section

<ul style="list-style-type: none">The policy will be set up as a Lifetime Annuity (not a Scheme Pension).The annuity policy and payments will commence immediately upon receipt of funds (i.e. no backdated start date).This is a standard retirement quote request (not a death in service claim).You do not require identity documents before releasing funds for the purchase of an annuity.	Notes:
	Template completed by:
	Date:

Once completed please password protect this form and email to Retirementservice@hl.co.uk

* This will be paid by the scheme for Open Market Options or the annuity provider for full fund transfers.

** Members sometimes request this instead of an Open Market Option if they are looking to combine several pensions in one annuity purchase.