

SCOTTISH WIDOWS APPLICATION FOR LIFETIME ANNUITY

HARGREAVES
LANSDOWN

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.

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.