

# Application for Just Retirement Pension Annuity Trustee/Administrator Section

If you have any queries, please call Hargreaves Lansdown on 0117 314 1798.



Member's name	Quote number
Name and address of scheme/administrator	
	Postcode
HMRC registration number for scheme	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Do the scheme rules require a start date for the annuity?</b> Yes <input type="checkbox"/> No <input type="checkbox"/> If yes enter start date <input style="width: 100px;" type="text"/> / <input type="text"/> / <input type="text"/>	

(See [www.hmrc.gov.uk/manuals/rpsmmanual/RPSM11102050.htm](http://www.hmrc.gov.uk/manuals/rpsmmanual/RPSM11102050.htm))

Reason for required start date

Note: If YES, a backdating fee may apply. If NO, the annuity will start immediately upon receipt of funds and required information.

In whose name is policy to be issued?                      Annuitant                       Trustee

Is this to be:                      Scheme Pension                       Lifetime Annuity

**Percentage of standard Lifetime Allowance used up under this scheme in relation to this annuity purchase** (including Pension Commencement Lump Sum):  %

(Please calculate with reference to whether the annuity is a Scheme Pension or Lifetime Annuity)

Type of scheme	Defined Contribution	Defined Benefit
Purchase price to be used to secure a pension income, <b>excluding any Pension Commencement Lump Sum</b>	£	£  pa
Are any of the benefits to be used as part of a divorce settlement? If YES, please provide details on a separate sheet.	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are any of the benefits subject to a bankruptcy order? If YES, please provide details on a separate sheet.	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are the benefits in respect of a spouse, registered civil partner or dependant payable on the death of the scheme member? If YES, please provide details on a separate sheet.	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are any of these funds currently in Income Drawdown	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Pension fund	£	£
Pre 88 GMP - Please also complete GMP Section below		£                      pa
Post 88 GMP - Please also complete GMP Section below		£                      pa
6/4/97 to 5/4/05 COSR/NCOR (delete as appropriate)		£                      pa
Post 05 COSR/NCOR (delete as appropriate)		£                      pa
Where benefits are being transferred from a Defined Benefit scheme or there has been a previous transfer in from a Defined Benefit scheme, were retirement ages equalised?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

## GMP Details – to be completed in all cases containing GMP

	Pre 88 GMP	Post 88 GMP
GMP at date of leaving service	£ <input type="text"/> pa	£ <input type="text"/> pa
GMP at State Pension Age (SPA)	£ <input type="text"/> pa	£ <input type="text"/> pa
GMP at retirement date (where this differs from SPA)	£ <input type="text"/> pa	£ <input type="text"/> pa
Date of leaving service	<input type="text"/> / <input type="text"/> / <input type="text"/>	Revaluation rate <input type="text"/> Fixed / S148 / Limited
Retirement date (where this differs from SPA)	<input type="text"/> / <input type="text"/> / <input type="text"/>	

**Payment Method** - How is the payment being made to Just Retirement? Direct credits are preferred

Cheque  By direct credit  on  /  /

For Direct Credits pay: Sort code 20 24 00, account number, 60346853, account name and address: Just Retirement Ltd – Main, Barclays Bank, 90-92 High Street, Crawley, West Sussex, RH10 1BP. **Please use the quote reference number as the reference.**

## Declaration 1 - For benefits to be paid through a Lifetime Annuity

We confirm that the scheme rules have been updated to reflect the Finance Act 2004 Yes  No

Where we require Just Retirement Limited to apply the scheme's financial dependency testing, we have supplied details on a separate sheet. Where this has not been supplied, Just Retirement Limited will apply their own rules surrounding financial dependency.

We understand that Just Retirement will follow the direction of the Pension Scheme Trustees in the distribution of benefits under a pension guarantee period and value protection and we must inform Just Retirement of any provisions within the schemes rules regarding this. Where no direction is given, benefits will be payable at the discretion of Just Retirement.

We confirm that the information provided is true and complete. We will pay any Pension Commencement Lump Sum at the same time as releasing the annuity purchase monies to Just Retirement Limited. We agree that payment of the annuity in accordance with our policyholder's instructions will constitute a full discharge for each payment under the contract.

Signed <input type="text"/>	Trustee(s)/Administrator <input type="text"/>	Dated <input type="text"/> / <input type="text"/> / <input type="text"/>
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## Declaration 2 - For benefits to be paid through a Scheme Pension

**Please note, where the policy is a Scheme Pension the Trustee(s)/Administrator are also required to sign the main application form.**

We confirm that the scheme rules have been updated to reflect the Finance Act 2004 Yes  No

We confirm that the information provided is true and complete. We will pay any pension commencement lump sum directly to the annuitant at the same time as releasing the annuity purchase monies to Just Retirement Limited.

We authorise the payment of the pension instalments after deduction of the appropriate tax due under the PAYE system, in accordance with the payment instructions provided. Yes  No

Or

We request payment of the gross pension instalments to the Pension Scheme Trustees. Yes\*  No

\*if selected please complete an application for gross pension instalments to be paid direct to pension scheme trustees.

We understand that Just Retirement will follow the direction of the Pension Scheme Trustees in the distribution of benefits under a pension guarantee period and value protection and we must inform Just Retirement of any provisions within the schemes rules regarding this.. Where no direction is given, benefits will be payable at the discretion of Just Retirement.

We declare that the trustee(s)/administrator of the pension scheme will remain responsible for providing the client with an annual statement of the percentage of lifetime allowance represented by that scheme. If you require Just Retirement Limited to assume this responsibility, please provide the relevant details on a separate sheet.

Signed <input type="text"/>	Trustee(s)/Administrator <input type="text"/>	Dated <input type="text"/> / <input type="text"/> / <input type="text"/>
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Thank you. Please return to:

**Hargreaves Lansdown, One College Square South, Anchor Road, Bristol BS1 5HL**