

RST & DC Benefits: Options form

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| Full name of Scheme |  |
| Type of request | Retirement quote / Death in service claim |
|  | Member details | Spouse/Partner details |
| Title (e.g. Mr, Mrs, Dr) |  |  |
| Surname |  |  |
| First name |  |  |
| Date of birth |  |  |
| Gender |  |  |
| Address (including postcode) |  |
| Telephone Number |  |
| Email address |  |
| Marital Status | Single / Married / Co-habiting / Divorced / Widowed / Civil Partnership  |
| Proof of age/marriage supplied? | Yes – Annuitant / Spouse / Marriage or No – HL to request |
| A) Set benefits to be bought from 9(2b) Rights (RST benefits) |
| Member reference |  |
| Annuity type | Lifetime Annuity or Scheme Pension |
| Annuity start date required? | Yes: DD-MM-YY or No: Immediate |
| Fund value needed to purchase required scheme benefits | £ |
| HL costing tool reference:HLRE - Or, if not available online: please specify income that must be bought on separate [costing template](http://corporate.hl.co.uk/__data/assets/pdf_file/0011/7196960/Pension-Costing-Request.pdf). |
| B) Excess benefits (If fund value exceeds purchase price for benefits bought by 9(2b) rights)  |
| Annuity type | Lifetime Annuity or Scheme Pension |
| Annuity start date required? | Yes: DD-MM-YY or No: Immediate |
| Value of excess benefits before PCLS deducted | £ |
| PCLS (to be deducted from excess) | £ |
| C) Transfer value (i.e. total value of A and B) – Transfer to an Immediate Vesting Personal Pension (current scheme rules will not apply once transferred) |
| Transfer value of fund | £ |
| Other pensions for consolidation – Transfer to an Immediate Vesting Personal Pension (current scheme rules will not apply once transferred) |
| Full name of scheme |  |
| Member reference |  |
| Type of scheme |  |
| Transfer value of fund | £ |
| Notes (Please provide any notes, special instructions or important information) |
| Notes:  |
| Completed by:  | Date: |
| Once fully completed, please email this form to Retirementservice@hl.co.uk |