

Subject Access Request

Application Form

How to fill out this form

Please use black ink and CAPITAL LETTERS or tick as necessary.

Any corrections must be initialled; do not use correction fluid.

If completing online, please tick as appropriate.

If you need more space to give details on any of the questions, please continue on a separate sheet, cross-referring to the section. As you complete the form, please read the notes which are there to help you.

If you've moved in the last three years.

We might need to get in touch with you for more information.

This will help us search for any pension plans you might have with us.

Some important information before you start

You've asked to see what information we have about you

You are not required to complete this form, however it will help us to locate your personal data. We will require Proof of Identity before we can send your data to you, so please refer to Page 2 even if you choose not to complete the form.

- If you're asking for your own details fill in everything, except section 1.
- If you're asking to see someone else's information, you'll need to fill in the whole form. Please be aware that if your request is made via a Third Party (such as a solicitor or a Claims Management Company) the data we provide to them may contain special categories of data such as medical information or data relating to children.

How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to **The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB**.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

Your contact details

Title Mr Mrs Miss Ms Other

Surname First and second names

Maiden name or other names you've had before Date of birth

Your address and postcode

Your last address and postcode

Your mobile or telephone number

National Insurance (NI) number

Do you have a plan with Prudential? Yes No

We need some identification from you

We need two different forms of ID for you – one from group A and one from group B – both of which must show your full name and either your full postal address or date of birth:

<p>Group A – Evidence of full name and date of birth</p>	+	<p>Group B – Evidence of your full name and postal address. The document must be dated within the last three months.</p>
<p>Please send us a clear copy of one of these documents for each plan holder:</p> <ul style="list-style-type: none"> • A valid, signed passport. • A valid photo driving licence (full or provisional)/ valid paper full UK driving licence.* • An identity card issued by the Electoral Office for Northern Ireland. • Recent evidence of entitlement to state or local authority funded benefit (including housing and council tax benefit), tax credit, pension, educational or other grant. • A firearms certificate or shotgun licence. 	+	<p>Please send us a clear copy of one of these documents for each plan holder:</p> <ul style="list-style-type: none"> • A valid photo driving licence (full or provisional)/ valid paper full UK driving licence.* • A bank statement (digital copy/paper-style copy) showing your full name, full postal address, sort code and account number. • A credit/debit card statement (digital copy/ paper-style copy) issued in UK. • A recent utility bill either in digital format or paper-style copy (electricity, gas, dual fuel, water). • Most recent mortgage statement issued by a recognised lender. • Current council tax demand, letter or statement – dated within the current tax year. • Solicitor letter. • A letter from HM Revenue & Customs (HMRC), tax coding notice, assessment or statement. • Department for Work and Pensions (DWP) letter. • An instrument of court appointment (liquidator or grant of probate).

Don't forget to send us your identification with this form

* You can use a copy of your driving licence as proof of address, with a copy of your UK passport as proof of ID. This is the only time you can use two forms of ID from the same list.

If you can't send any of these documents, give us a call to talk about alternatives.

Please make sure the images you send are high quality, unobstructed, uncropped and are full document pages. The details on the images must match your account details.

We can't use any ID sent to us by email and please don't send us mobile phone bills or your TV licence.

Tick here if you're asking for your personal data

It's a crime to pretend to be someone else. By ticking below, you confirm that you're asking for your personal information under the General Data Protection Regulation. You also agree that we can get in touch with other people, like health professionals, to ask if they're happy for us to give you this information.

It is a criminal offence to knowingly provide false, misleading and/or forged information or documents for the purpose or intention of committing fraud as this may result in prosecution. By ticking the box below you declare that the information you are providing is correct.

I declare that the information I am providing is correct.

Section 1

Fill in this section if you want to see someone else's information

What's your relationship to this person

Parent Legal Representative Other

Is the person whose information you're asking for under 18? Yes Age No

Please fill in their contact details

Title Mr Mrs Miss Ms Other

Surname First and second names

Maiden name or other names you've had before Date of birth

D	D	M	M	Y	Y	Y	Y
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Their address and postcode

Their last address and postcode

National Insurance (NI) number

Do you have a plan with Prudential? Yes No

Tick here if this person is over 18

This request must be submitted with the agreement of all applicable data subjects. It is a criminal offence to knowingly provide false, misleading and or forged information/documents for the purpose/intention of committing fraud and this may result in prosecution. By ticking the box below all applicable data subjects are declaring that the information you are providing is correct.

I declare that the information I am providing is correct.

OR

Tick here if this person is under 18

If you're asking for information on behalf of someone under 18, you'll need to confirm that you're the Legal Representative we have listed in our records by ticking here.

This request must be submitted with the agreement of all applicable data subjects. It is a criminal offence to knowingly provide false, misleading and or forged information/documents for the purpose/intention of committing fraud and this may result in prosecution. By ticking the box below all applicable data subjects are declaring that the information you are providing is correct.

I declare that the information I am providing is correct.

Fill in one of the boxes.

If 'yes' let us know their age and tick the last box on page 3 of this document.

If they've moved in the last three years.

If they're over 16.

Section 2

What plans do you, or the person you're asking us about, have with us

If you are looking for details on your plan, and not for all personal data we hold on you, please refer to the Customer Service details on Page 7.

The type of plan you have	Your plan or account number	The claim number of any claims you've made	If you have a joint plan with us we need	
			The name of the joint plan holder	Their date of birth

If you have a workplace pension with us

Scheme name	Scheme number	Name of the organisation who runs your scheme

Do you have any other information that might help us find what you're looking for?

For joint plans we need the other person's consent

The other person on the joint plan will need to fill in and tick the box below so we can give you the information.

Name of the other planholder

I agree that you can give details of my/our plan

to

(the person who is asking for this information)

This request must be submitted with the agreement of all applicable data subjects. It is a criminal offence to knowingly provide false, misleading and or forged information/documents for the purpose/intention of committing fraud and this may result in prosecution. By ticking the box below all applicable data subjects are declaring that the information you are providing is correct.

I declare that the information I am providing is correct and I have consent from the other person

We'll also need proof of the joint planholder's identity. The documents we need are the same as on page 1.

Section 3

Fill in this section if the information you want isn't about one of our plans

What information are you looking for? Please continue on a separate sheet if required (maximum of 1200 characters per box)

How does this have anything to do with Prudential?

Can you give us the names of anyone you've been in touch with about this at Prudential?

Is there any other information you can give us to help find the information for you?

Section 4

How would you like us to send your information to you?

We can send your information to you in writing or on a CD, DVD or USB by secure tracked delivery.

Or if your files are less than 30mb we can send them by secure email.

Please send in writing by secure tracked delivery

You can email my files to this address:

I'd like my files on a:

CD or DVD for Windows devices only

USB data stick for Windows devices only

You'll find the answers to questions people often ask us on the next page.

If completing this form online, please send this securely, via PruMail, to

data.privacy@prudential.co.uk

If completing this form by hand, please send it back to us at:

The Privacy Team
Prudential
Lancing
BN15 8GB

Before you send this form back to us, check that you have included (or attached, if sending by email):

- Your completed form, where applicable
- Your proof of identity (and if you have a joint plan holder, make sure they provide theirs too)
- A Letter of authority, a court order or your power of attorney if you're asking for someone else's information

If your files are over 30mb and we can't email them to you, you'll also need to choose a format.

Section 5

How would you like us to send your information to you?

What is a Subject Access Request (SAR)?

A SAR gives you the right to see what personal information we hold about you under the General Data Protection Regulation.

Will you charge me for this information?

No – in most cases we won't charge you for this information. But if you ask us for information that is deemed to be excessive, or if you make multiple requests for information, we may ask for a fee.

How long will it take?

We will reply without undue delay, and at the latest within one month of receiving the request. If the request is complex, we may extend this by a further two months.

Your right to Complain

You have the right to lodge a complaint to the UK Information Commissioner's Office. Information about how to do this is available on its website at ico.org.uk.

What if I just want to know details about my plan, like the start date?

You can call us on: 0800 000 000

Or write to us at:

Customer Service Centre
Prudential
Lancing
BN15 8GB

Or go to: pru.co.uk

Have you sold me Personal Payment Insurance?

The only plans we've sold with Payment Protection Insurance, or that come under the Consumer Credit Act, are our Prudential branded mortgages and our Lifetime Mortgage products.

If you have had a Prudential branded mortgage through Egg plc, you'll need to contact Egg plc as they have all the information for these products. Their address is:

Customer Relations
Canada Square Operations
PO Box 4903
Worthing
BN99 3AR

pru.co.uk

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