

# Top-up application form

## How to fill out this form

Please use black ink and write in CAPITAL LETTERS or tick  as appropriate.

Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

## About this form

If you have any questions about this form, you can call us on **0345 640 2000** between 8am and 6pm, Monday to Friday.

We might record your call for training and quality purposes. To find out more about how we use your personal data please visit [pru.co.uk/mydata](https://pru.co.uk/mydata)

Please read the Key Features Document as this will provide you with important information regarding the key risks and benefits of the product(s) to help you make a decision.

Remember to complete the Direct Debit form in order to set up monthly payments from your Bank or Building Society account.

Please return all pages of this form in the enclosed reply paid envelope to:

**FREEPOST, Prudential, Lancing BN15 8GB.**

## Trustees – Trust Registration Service (TRS) requirements

By completing this form it means that you must comply with the requirements under the Trust Registration Service (TRS).

Before you start to complete the process, we recommend that you read this guide which will help you understand what is required: [mandg.com/pru/adviser/trs](https://mandg.com/pru/adviser/trs)

**IMPORTANT: For individual applications for policies to be issued into trust a copy of the Proof of Registration document showing registration details must be sent in along with the application.**

- A copy of the Proof of registration document dated within the last 30 days will need to be sent to us along with this form unless there is an exemption.
- All details of the trust on the TRS (such as trustees, beneficiary classes and named beneficiaries) must match what's held on the trust document.

If you need more general information, further details can be found at [gov.uk/guidance/register-a-trust-as-a-trustee](https://gov.uk/guidance/register-a-trust-as-a-trustee)

## For office use only

Branch and portfolio number

Perno number

Was a personal recommendation given by your Financial Adviser?

Yes

No

## Your details

Bond number

First bond holder (or donor for child's bond) Name

Second bond holder/child's Name

## Your details – continued

Address

  
  
  

Postcode

Home telephone number

Work telephone number

Address

  
  
  

Postcode

Home telephone number

Work telephone number

## Details of increase to savings

Additional lump sum investments

£  minimum £300

Is this from a maturing Prudential policy?

Yes

No

## Section A – Maturing policy

Maturing policy number

Maturity date

D	D	M	M	Y	Y	Y	Y
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## Section B – additional lump sum investment

Anticipated savings term  years (Minimum suggested term is 5 years)

Please provide details for all lump sum investments over £30,000. This information is required to help us to fulfil our regulatory and legislative anti-money laundering obligations.

Occupation

Annual income (including pension, if applicable)

£

Source of funds for this investment

(e.g. a UK bank account)

Source of wealth (not applicable to corporate/trustee applicants)

(Origin of funds for this investment .g. saved from salary, inheritance, property sale, divorce settlement)

If you are topping up with money that is not from a maturing policy, please make your cheque payable to: The Prudential Assurance Company Limited, and enclose it with this application form.

Bank/Building Society cheque/money order: When completing the name of the payee on the cheque/money order, the Bank/Building Society should include reference to the name of the account from which the funds have been withdrawn. For example, "pay...The Prudential Assurance Company Limited – Re: your name".

Additional regular savings

£  monthly

Direct Debit payment date (✓)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st	8th	15th	22nd

Please complete the Direct Debit form overleaf.

Anticipated savings term  years (Minimum suggested term is 5 years)

If yes please complete section a) below, if no please complete section b)

Minimum amount:

£20 to top up existing regular savings £50 to start regular savings if:

- (i) no maturity amount is also reinvested and
- (ii) you are not continuing savings from a maturing Prudential policy

£30 if starting regular savings in combination with an investment from a maturing policy.

## Declaration

Please read the following declaration carefully and sign below.

By signing this application, you declare that:

- You understand that this top-up bond is subject to written acceptance of this application by Prudential at its Customer Services Office in Lancing.
- The information given is true and complete and shall be the basis of the contract.
- You have received a copy of the “Key Features of Prudential Investment Bond”.
- You are aware of the situation regarding any possible future tax liability (under current legislation). Details are in the Key Features of Prudential Investment Bond.
- You understand that a Market Value Reduction may be applied in certain circumstances. Details are in the Key Features of Prudential Investment Bond.
- You understand that the payment forms part of the application. An incorrectly completed instruction may require us to return your application, which could have an adverse effect on the initial purchase price of your investment and could mean your application is rejected.
- The earliest date that any premium from whatever source will be applied to secure units in the bond is the date of receipt of such premiums at Prudential’s Customer Services Office in Lancing.

- You understand that the bond is a long-term investment and that it is not designed for withdrawals to be taken in the short term.
- You understand that this is a With-Profits investment. Details are in the Key Features of Prudential Investment Bond.
- You understand that, where this is a child’s bond, any benefits must be applied solely for the benefit of the child.

### How we use your and the child’s personal information

For a copy of our latest Data Protection Notice, please visit [pru.co.uk/mydata-eq](http://pru.co.uk/mydata-eq). This details how and why we use your and the child’s personal information (including any sensitive personal information), who we may share it with and your and the child’s rights around both of 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 about you and the child that is necessary for us to either provide you and the child 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 and the child.

For your own benefit and protection you need to read carefully the documentation provided before signing this form. You also need to read carefully any further documentation provided to you in the future. If there is anything you do not understand please ask us for further information.

Signature of first bond holder/donor

Date signed

D	D	M	M	Y	Y	Y	Y
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Signature of joint bond holder

Date signed

D	D	M	M	Y	Y	Y	Y
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A written copy of the terms and conditions on which the investment will be made, and the completed application form are available on request from Prudential Customer Service Centre, Lancing BN15 8GB.



### Instruction to your bank or building society to pay by Direct Debit

Please fill in the whole form using a ball point pen and send it to:

Prudential,  
Lancing,  
BN15 8GB.

Service User Number

9	4	0	3	3	7
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Name(s) of account holder(s)


Your Prudential Bond number


Bank/Building Society account number

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Branch Sort Code

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Instruction to your bank or building society

Please pay Prudential Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Prudential and, if so, details will be passed electronically to my bank/building society.

Name and full postal address of your bank or building society

To: The Manager


Signatures


Address


Postcode

Date signed

D	D	M	M	Y	Y	Y	Y
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Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

## The Direct Debit Guarantee



This Guarantee should be detached and retained by the Payer.

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Prudential will notify you a minimum of 5 working days in advance of your account being debited or as otherwise agreed. If you request Prudential to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Prudential or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
  - If you receive a refund you are not entitled to, you must pay it back when Prudential asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

[pru.co.uk](https://pru.co.uk)

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## The Direct Debit Guarantee



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