Ongoing adviser charge instruction form

Income Choice Annuity

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.

Some information before you start

Please fill out this form if you want to:

- stop your ongoing adviser charge to your existing adviser
- start paying an ongoing adviser charge to your existing adviser
- amend the amount of ongoing adviser charge paid to your existing adviser.

Completing this form

You can stop or reduce your adviser charges, over the phone by calling us on **0345 640 0000**.

If you have any questions when completing this form, please speak to your financial adviser.

How to return this form

Please post this form to Freepost. **Prudential, Lancing BN15 8GB**.

Section 1 – Personal details

Surname

Forenames

Phone number

Annuity reference number

This is required in case we need to contact you regarding this request.

Section 2 – Select your choice – start, amend or stop

Ongoing adviser charges will be paid to your adviser at the same frequency as you get paid your annuity income.

We can pay up to 1% of your original pension fund less any tax-free cash and Set-up adviser charge.

2.1 Start ☐ or Amend ☐

Please indicate the amount of ongoing adviser charges that you have agreed with your adviser.

% each year or £ a fixed monetary amount each year.

The amount in the box above must be divisible by 12, if it's not we'll round it down.

Date you want ongoing adviser charges to start* D D M M Y Y Y Y

* This must be at least 30 days after the start of your plan.

Please allow at least 10 working days for us to process your instruction.

Go to section 3

2.2 Stop ☐

Any instructions to stop an adviser charge will be processed, however depending on when the instruction is received this may not be in time to stop the next payment.

Go to section 3

Section 3 – Declaration

- I authorise Prudential to act upon my instructions regarding the facilitation of ongoing adviser charges (the "ongoing adviser charge instruction"). I also understand that Prudential shall not be required to carry out such instructions (including any permitted by my adviser firm) where they conflict with any applicable law or regulation and/or where they are inconsistent with Prudential's ongoing adviser charge administration capability.
- I understand that where there is a difference between the ongoing adviser charge instruction and the ongoing adviser charges agreed with my adviser firm, Prudential will only facilitate payment in accordance with my ongoing adviser charge instruction.
- I understand that if the level of VAT applicable within the ongoing adviser charge changes Prudential will only alter my ongoing adviser charge following a new ongoing adviser charge instruction or instruction from my adviser firm which sets out the new level of charges to be deducted.
- I agree that the ongoing adviser charge may be reduced or stopped by Prudential or my adviser firm without my explicit authority.
- I agree that where my adviser firm arranges for the services I have agreed with them to be provided by another adviser firm, I authorise Prudential to amend my adviser charge instructions to pay the adviser charges at the existing agreed level to the new adviser firm, except where they conflict with any applicable law, regulation and/or HMRC practice and/or where they are inconsistent with Prudential's adviser charge administration capability.
- I understand that unauthorised payments and tax charges, for which I will be liable, may apply if the above conditions are not met.
- I understand that any ongoing adviser charges will be deducted from my income after the deduction of any tax.

Please read this form carefully before signing it. If there is anything you don't understand, please speak to your financial adviser.

Your signature

Date

D	D	M	M	Y	Y	Y	Y

Keep track of your plan online, at a time that suits you

With your Online Service you can check the value of your plan, contact us securely, change personal details and view your documents. If you're not registered, it's easy and only takes five minutes. You'll need your Annuity Reference Number, postcode and date of birth. Go to **pru.co.uk/registeronline** to find out more.

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