

Annual scheme review questionnaire

How to fill out this form

If filling in this form by hand, please use black ink and CAPITAL LETTERS. Any corrections should be initialled. Please do not use correction fluid.

Scheme name

Scheme number

HMRC Pension Scheme Tax Reference (PSTR)

Pension Scheme Registration Number

About this form

Although we only administer the Policy(ies) under this Scheme rather than the Scheme itself, we still need to make sure our records are up to date and accurate so that we can administer the Policy(ies) correctly. Therefore, please provide us with the information requested below about your Scheme, including any changes to it that have taken place in the past Scheme year. When reviewing that information, we may need to contact you for more details.

When replying, please also provide copies of any updates to the Scheme's legal documentation.

While we are asking you to provide us with email addresses ongoing correspondence about the Policy will continue to be by post. You can download additional copies of this questionnaire from pru.co.uk/trustees

Please complete, date and return the form to:

**Prudential
Lancing
BN15 8GB**

Section 1 – Trustee information

Trustee's full name

Trustee's contact telephone number

Trustee's full address

 Postcode

Trustee's registered number, if limited company or plc

Trustee's contact email address

Trustee's full name

Trustee's contact telephone number

Trustee's full address

 Postcode

Trustee's registered number, if limited company or plc

Trustee's contact email address

Section 1 – Trustee information – continued

Trustee's full name

Trustee's contact telephone number

Trustee's full address

Postcode

Trustee's registered number, if limited company or plc

Trustee's contact email address

Trustee's full name

Trustee's contact telephone number

Trustee's full address

Postcode

Trustee's registered number, if limited company or plc

Trustee's contact email address

Provide the following information about any changes to Trustees in the past Scheme year

Effective date of change

D	D	M	M	Y	Y	Y	Y
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Nature of change – appointment or resignation

Trustee's full name

Trustee's registered number, if limited company or plc

Trustee's full address

Postcode

Confirmation if a copy of deed is enclosed;
records cannot be updated without a copy

Please continue on a separate sheet of paper, if necessary.

Section 2 – Declaration

Once this document has been fully completed, the following declaration must be signed by all Trustees of the Scheme, in the space provided.

Please remember to date the form.

We the undersigned confirm the information provided in this questionnaire is true and correct.

We undertake to inform Prudential immediately:

- (i) of any change of name and/or address of any Trustee;
- (ii) the proposed appointment of any new Trustee to the Scheme;
- (iii) the removal or resignation of any existing Trustee; and
- (iv) any other material Scheme change eg change of Scheme name.

Trustee's full name

Position

Signature

Trustee's full name

Position

Signature

Trustee's full name

Position

Signature

Trustee's full name

Position

Signature

Date

D	D	M	M	Y	Y	Y	Y
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pru.co.uk

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