

Group Personal Pension/Group Stakeholder Change of Employment – Leaving the Scheme

Application 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

Warning: Please ensure the following answers are true and complete. Failure to disclose material facts (facts which would be likely to influence Prudential's assessment of this application) may lead to cancellation of the contract. If you are in any doubt as to whether facts are material, full details should be provided. It is a serious offence to give false information and to do so could lead to prosecution.

Copies of the plan Terms and Conditions and the completed application form are available on request from Prudential, Lancing BN15 8GB.

Part A – Your details

Title Mr Mrs Miss Ms Other

Surname

Full Forename(s)

Permanent Residential Address

<input type="text"/>
<input type="text"/>
Postcode

Daytime telephone number

Plan number

National Insurance (NI) number

Yearly Gross Earnings

£

If your new employer has agreed to pay contributions to your plan, or to arrange for your contributions to be paid to Prudential, please complete Part B. Otherwise, go straight to Part C.

Part B – New employer's details

New Employer's Name

New Employer's Address

<input type="text"/>
<input type="text"/>
Postcode

Contact telephone number

Date you joined your new employer

D	D	M	M	Y	Y	Y	Y
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Please include area code.

Your earnings figure will allow us to give you more meaningful quotations. We will compare estimated eventual benefits with your estimated retirement earnings. If you don't give an earnings figure, we will use the current national average earnings figure projected to your retirement date for the comparison.

Part C – Eligibility details

Are you a UK resident for tax purposes? Yes No

If No, are you a Crown Servant or married to or a civil partner of a Crown Servant? Yes No

If the answer is No to both of these two questions, you may not be eligible to contribute and get tax relief. You should check this with your scheme adviser.

Part D – Contributions and benefits

Please show amounts before deduction of any tax relief, and ignore the “Employer” column if you are self-employed or if there is now to be no employer involvement in your plan.

	Member		Employer	
Is the current contribution to be maintained?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

If the total contribution and/or life cover is to **increase**, please speak to a **Financial Adviser**.

Alternatively, please show the reduced amounts

Is the current level of life cover to continue? Yes No

(This is only allowed if employer contributions are being paid)

If, No please show the reduced cover

Do you want to pay any outstanding contributions? Yes No

If No, contributions will start from the next contribution due date.

Note: If you reduce contributions you will not be able to increase these again under your existing plan(s).

Unless you confirm that your life cover is to be reduced, your cover can be maintained provided the continuing contributions are adequate. If a reduction in cover is necessary, because of lower contributions, we will tell you.

If your new employer has agreed to continue part or all of the contribution previously paid by you or your old employer, your new employer should complete Part F.

Part E – Investor’s declaration

Please read this declaration carefully before adding your signature and the date. This application is part of a process set by HM Revenue and Customs for getting tax relief on contributions. It is, therefore, a serious offence to make false statements. The penalties are severe and could lead to prosecution.

1. I declare that, to the best of my knowledge and belief, the information given by me in this form is true and complete.
2. I agree that
 - The current term of my Prudential pension plan(s) will continue for the details confirmed in Part D of this form, and
 - if the total contributions (mine and any paid by my previous employer) paid to my plan(s) immediately before my change of employment/employment status are to be increased, the increase amount(s) will be confirmed separately and may not attract the same financial terms as those applying to current contributions, OR
 - if the total contributions (mine and any paid by my previous employer) paid to my plan(s) immediately before my change of employment/employment status are reduced, this may result in a reduction to the number of units credited to my plan(s), as described in my plan terms.
3. I declare that
 - to the best of my knowledge and belief, the details given by me in this application are true and complete and agree that the terms of this application, any other written statement by me or on my behalf to Prudential, the answers to any additional questions put to me by Prudential’s Medical Examiner, together with Prudential’s Acceptance, shall form part of any relevant contracts
 - my total contributions to all UK registered pension schemes (schemes that attract tax relief) will not exceed the higher of
 - (i) my annual Relevant Earnings (broadly UK taxable earnings directly from a trade, or profession or employment) and
 - (ii) £3,600, if my annual Relevant Earnings do not exceed £3,600.
- if I cease to be a UK resident for tax purposes or cease to be eligible for tax relief on any contributions that I am paying (because my earnings have reduced), I will write to Prudential to confirm this before the later of
 - (i) 30 days after the change, and
 - (ii) the 5 April at the end of the tax year when my circumstances change.
4. I understand that
 - my regular contributions, if any (net of tax at the basic rate) will be deducted from my earnings after all other deductions and will be sent to Prudential along with my employer’s/ firm’s contributions (if any) and I authorise such deductions from my earnings.
 - if my employer is contributing to the plan, my employer intends to continue to contribute but may stop at any time and, if this happens, I will be told.
 - I can alter the terms of my plan by giving revised instructions to Prudential, in writing, and that these revisions can be either directly from me, from my employer, or from the financial adviser who arranged my plan (or from any other adviser agreed by my employer and confirmed in writing to Prudential) provided that Prudential agree the proposed change(s) and that they are allowed in terms of the Rules.
 - Prudential may alter the terms of my plan if I apply to continue the plan having left the Group Scheme.
5. I consent to
 - Prudential giving my employer/firm information about my plan if my employer/firm has agreed to arrange contribution payments.
 - Prudential getting more information, and I consent to the giving of such information, as may be necessary for the installation and administration of my plan.

Signature of Investor

Date

D	D	M	M	Y	Y	Y	Y
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**Prudential as administrator agrees to administer the scheme
as required by the rules of the scheme.**

Part F – Declaration by employer

To be completed only if the Employer is contributing or paying contributions on the Employee's behalf.

1. We, as Employer of the Employee who has completed this application, confirm our agreement to pay contributions in accordance with this application to provide benefits in respect of the said employee.
the said Employee and, as agent, to send such contributions, together with our own regular contributions, if any, in accordance with Part D to Prudential by means of a Direct Debiting Instruction or other payment basis agreed with Prudential.
2. We agree, having been so authorised by the employee, to deduct from payments of salary or wages, after all other deductions, his or her regular contributions, if any (net of tax relief at the basic rate in force at the time the regular contribution is paid to Prudential) and undertake to hold such contribution as agent for
3. We will ensure that contributions are paid to Prudential before the 19th of each month following deductions, if any, from the employee's pay, (to meet the legislative "contribution monitoring" rules).

Signed for and on behalf of the Employer

Date

D	D	M	M	Y	Y	Y	Y
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Please make sure that the Direct Debiting Instruction is correctly completed (if appropriate) following the instructions on the back page.

Instruction to your bank to pay by Direct Debit

Please complete Parts 1 to 4 to instruct your Bank to make payments directly from your account.

1. Name of account holder (BLOCK CAPITALS PLEASE)

2. Bank Sorting Code

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Bank account number

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3. Name and address of bank (BLOCK CAPITALS PLEASE)

To: The Manager
Address
Postcode



Prudential Assurance Company Ltd
Lancing BN15 8GB

For Prudential Assurance Company Ltd Official Use Only.
This is not part of the instruction to your bank or building society.

Reference

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Service User Number

1	7	7	4	6	2
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Instruction to your bank or building society

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

Signature(s)

Date

D	D	M	M	Y	Y	Y	Y
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Banks may decline to accept instructions to pay Direct Debits from some types of accounts.

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.

The Direct Debit Guarantee



- 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 Assurance Company Ltd will notify you at least 5 working days in advance of your account being debited or as otherwise agreed. If you request Prudential Assurance Company Ltd 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 Assurance Company Ltd 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 Assurance Company Ltd 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

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