

Additional contributions application form

PV1

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.

If 'Other', please state title.

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 Average Weekly Earnings (AWE) figure projected to your retirement date for the comparison.

Occupation is an industry requirement.

* There are a number of possible ways you may trigger the Money Purchase Annual Allowance (MPAA) when accessing your benefits flexibly. Your pension scheme or provider will have informed you if this is the case. For further information please speak to your Financial Adviser.

About this form

Please fill in this form if you would like to increase pension contributions for a scheme member, but only use this form if you already have a Premier Executive Pension plan for the member.

If you want to add new features to the Premier plan for the member, which do not apply to the existing plan, such as regular contributions for the first time or additional life cover, please complete a full application form.

Please read the key features document as this will provide you with important information regarding the key risks and benefits of the product to help you make a decision.

Please also read your fund guide, available at www.pru.co.uk/funds/guides, as this will provide you with full details of the funds available, their objectives, Prudential's risk rating of these funds and the charges and costs to help you select the funds suitable for your needs.

Copies of the plan terms and conditions and the completed application form are available on request.

Part A should be completed by the member and all other parts completed by the Trustees.

Part A – Member's personal details

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="text"/>
Surname	<input type="text"/>				
Full Forenames	<input type="text"/>				
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				
Yearly Earnings	<input type="text"/> £				
National Insurance number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				
Nationality	<input type="text"/>				
2nd Nationality (if applicable)	<input type="text"/>				
Have you previously accessed benefits flexibly?*	Yes <input type="checkbox"/>				No <input type="checkbox"/>
If Yes, please specify the date these were accessed	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				

Trustees' Authority

Part B – Scheme details

What is your occupation	Occupation Sector/Industry
<input type="text"/>	<input type="text"/>
Occupation examples: Teacher, Sales, Engineer, Project Manager	Industry example: Primary education, Construction of commercial buildings, Banking
Scheme name	
<input type="text"/>	
	Retirement Benefits Scheme
Scheme number (if known)	What is the member's existing plan number?
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Additional regular contributions will be paid monthly or yearly, on the basis for current contributions, with investment in the same fund(s) as currently apply to the plan shown in part B.

If existing plans for the member do not have automatic increases, you can choose any increase rate. If you choose automatic increases for the first time, this will apply to the total contributions (new and existing) to the Scheme for the member. If there is already automatic increases for the member, this will apply to the new contribution. Automatic increases will not operate in the first six months after the start of contributions in respect of this application, but otherwise will apply on each scheme review date.

Part C – Regular contributions

PV2

When do you want the increase in contributions to start?

M	M	Y	Y
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Additional regular contribution

Payable by

the employer

£

the member

£

Do you want contributions to increase automatically each year?

Yes

☐

No

☐

If Yes, by what rate?

% p.a.

or Average weekly earnings (tick)

☐

Whole number –

Minimum 5%/Maximum 15%

If a single contribution is to be paid for the member, please complete parts D to F, otherwise go straight to part F.

Part D – Single contribution

Please use the separate Premier Transfer Plan (GMPP/EPP) Application for a transfer payment from other pension arrangements.

Total single contribution

£

Member's contribution, if any, included in the above single contribution

£

Please show the percentage investment split you want for the single contribution.

Fractions of 1% should not be used. You can invest in up to six funds for each total single contribution.

The With-Profits Fund is not available for new or additional investment if the member is within three years of Normal Retirement Date (and, if chosen, would be treated as an application to invest in the Cash Fund).

Please make sure your total equals 100%.

These options do **not** apply to With-Profits investments.

Please tick only **one** option to apply for new Single Contribution(s).

If you also want these options added to your existing contributions, please complete an Investment Alteration Request (P863).

Part E – Investment of single contribution

Please refer to your fund guide, available at www.pru.co.uk/funds/guides, for more information on the funds, the associated risks and the charges and costs.

If you want a Lifetime Investment Profile (see below), you can also choose the investment linked fund(s) to be used initially by completing the table below, or you can leave the selection to us. There is a set basis, we do not make an individual choice. Your fund guide shows what this will be.

If you do NOT want a Lifetime Investment Profile, please complete the table below to confirm the investment fund(s) to be used.

Chosen Funds	Single Contribution: % to be invested in each fund
	%
	%
	%
	%
	%
	%
	%
Total	100%

If you invest in the With-Profits Fund a Market Value Reduction (MVR) may be applied if you subsequently switch to another fund. This will have the effect of reducing your fund value. Please refer to the Key Features Document for more details on Market Value Reduction.

If you want one of the following options, please complete the rest of this section (ticking only one box). Otherwise, please go to Part F now:

Lifetime Investment Profiles

- ☐ Lifetime Investment Profile targeting **retirement options**
- ☐ Lifetime Investment Profile targeting **an annuity**
- ☐ Lifetime Investment Profile targeting **100% cash**
- ☐ Lifetime Investment Profile targeting **drawdown**

Please go to part F.

Part F – Trustees' declaration

We declare that, to the best of our knowledge and belief, the information on this form is true and complete.

We request that the benefits for the member be increased in accordance with this application.

Signed for and on behalf of the Trustees

Date

D

D

M

M

Y

Y

Y

Y

For Completion by Financial Adviser

1. Source of funds for this investment (e.g. a UK bank account)

Source of wealth – (Origin of funds for this investment e.g. employer contribution, trustee bank a/c. If other, please give detail)

2. Commission Instructions for Single Contributions

Please tick only one of the boxes below to confirm your commission basis. Please then complete the amount of commission in the right hand boxes. For initial commission, this should be expressed as a flat percentage.

Example:

Initial

☒

2 %

Single Contributions

% to be taken

a) Initial

%

b) Fund related

%

Initial

Fund related

c) Mixed Initial/Fund

%

%

d) Nil Commission

Was advice given?

Yes

No

Name in block capitals

Position in firm

Signature

Date

D	D	M	M	Y	Y	Y	Y
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For Prudential Use Only

Cheque Acknowledgement Number

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Cheque Amount

£

Date Stamp

SD Agreed by