

Application for additional contributions

How to fill out this form

Please use black ink and 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.

* 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

RW

If you have any questions about this form, you can call us on **0808 234 3030** between 8.30am and 6pm Monday to Friday.

Calls may be monitored or recorded for quality and security purposes.

Please return all 6 pages of this form in the enclosed reply envelope to: **Prudential, Lancing BN15 8GB**.

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.

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.

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 an Executive Pension Plan (Series A) for the member.

If you want to add new features to the Series A 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.

Page 1 should be completed by the member and pages 2 and 3 by the Trustees to confirm the new contributions.

Section A – Personal details

Title Mr Mrs Miss Ms Other

Surname

Full Forenames

National Insurance No.

Date of birth

If your earnings have changed since last giving information to us, please show the current position.

Yearly Earnings £

Have you previously accessed benefits flexibly?* Yes No

If Yes, please specify the date these were accessed

Trustees' Authority

Section B – Scheme details

Scheme name

Scheme number (if known)

 P

What is the member's existing plan number?

Section C – Regular contributions

Month Year

When do you want the increase in contributions to start?

Additional regular contribution

Payable by

the employer

£

the member

£

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 are already automatic increases for the member these will also apply to the new contributions.

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.

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%

Section D – Single contribution

Please use the appropriate transfer application for a transfer payment from other pension arrangements.

Total single contribution

£

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

£

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 you selected in section B.

If a single contribution is to be paid for the member, please complete sections D and E, otherwise go straight to section G.

Section 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 this application includes a 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%.

Is the Scheme Investment Strategy to apply? Yes No

If Yes, please now complete Section G. If No, please complete the remainder of this section.

If you don't want the Scheme Investment Strategy, but want a Lifetime Investment Profile (see below), you can 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 don't want the Scheme Investment Strategy or a Lifetime Investment Profile, please complete the table below to confirm the investment fund(s) to be used.

Chosen Funds	% to be invested in each fund
	%
	%
	%
	%
	%
	%
	Total 100%

Lifetime Investment Profiles

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

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

These options do not apply to With-Profits investments.

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

Please now go to section G.

Section F — How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata-cp. 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.

Section G – 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 of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

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

For completion by Financial Adviser – essential information – all sections to be completed

1. Source of funds for this investment

(eg a UK bank account, overseas 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. Your Firm Reference Number
(Registered Individuals)

Reference Number

e.g. A B C 1 2 3 4 5

Or

Registered Individual's Forename

And

Registered Individual's Surname

3. Your agency details

Your Prudential (SAL)
agency number

e.g. 1 2 3 4 5 6 X

Or Agency name &
address stamp

4. Your Customer Reference Number
(if any)

Your usual commission and routing instructions (for issue of acceptance letter and plan documents) will apply.
If you want to give us different instructions for this case, please complete 5 and 6 below.

5. Commission Instructions (if different from your usual instructions)

For completion by Financial Adviser – essential information – all sections to be completed – continued

6. Routing Instructions (if different from your usual instructions)

Acceptance Letter

Direct to Trustee(s) with copy to you

Both to you

Plan Documents to:

Trustee(s)

You

7. Was advice given? (Please tick one box)

Yes

No

For Prudential use only

Cheque acknowledgement number

Cheque Amount

£

Date Stamp