



Top-up 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

If you have any questions about this form, you can call us on 0845 640 2000 between 8am and 6pm Monday to Friday.

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

Remember to complete the Direct Debit form in order to set up monthly payments from your Bank or Building Society account.

Please return all pages of this form in the enclosed reply paid envelope to:

FREEPOST, Prudential, Stirling FK9 4UE.

For office use only

Branch and portfolio number

Perno number

Your details

First bond holder (or donor for child's bond)

Bond number

Name/Donor

Child's name

Address

 Postcode

Home telephone number

Work telephone number

Joint bond holder

Second bond holder

Name

Address

 Postcode

Home telephone number

Work telephone number

Details of increase to savings

Additional lump sum investments

£ minimum £300

Is this from a maturing Prudential policy?

Yes

No

Maturing policy number

Maturity date

D	D	M	M	Y	Y	Y	Y
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Anticipated savings term years (Minimum suggested term is 5 years)

Please provide details for all lump sum investments over £30,000. This information is required to help us to fulfil our regulatory and legislative anti-money laundering obligations.

Occupation

Annual income (including pension, if applicable)

£

Source of funds for this investment

(e.g. a UK bank account)

Source of wealth (not applicable to corporate/trustee applicants)

(Origin of funds for this investment e.g. saved from salary, inheritance, property sale, divorce settlement)

If you are topping up with money that is not from a maturing policy, please make your cheque payable to: Prudential Assurance Company Limited, and enclose it with this application form.

Bank/Building Society cheque/money order: When completing the name of the payee on the cheque/money order, the Bank/Building Society should include reference to the name of the account from which the funds have been withdrawn. For example, "pay...Prudential Assurance Company Ltd – Re: your name".

Additional regular savings

£ monthly

Direct Debit payment date (✓)

1st	8th	15th	22nd
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Please complete the Direct Debit form overleaf.

Anticipated savings term years (Minimum suggested term is 5 years)

Minimum amount:
£20 to top up existing
regular savings

£50 to start regular
savings if:

- (i) no maturity amount is also reinvested and
- (ii) you are not continuing savings from a maturing Prudential policy

£30 to start regular savings by continuing regular savings from a maturing Prudential policy

Declaration

Please read the following declaration carefully and sign below.

By signing this application, you declare that:

- You understand that this top-up bond is subject to written acceptance of this application by Prudential at its Customer Services Office in Stirling.
- The information given is true and complete and shall be the basis of the contract.
- You have received a copy of the "Key Features of Prudential Investment Bond" and understand its content.
- You are aware of the situation regarding any possible future tax liability (under current legislation). Details are in the Key Features of Prudential Investment Bond.
- You understand that a Market Value Reduction may be applied in certain circumstances. Details are in the Key Features of Prudential Investment Bond.
- You understand that the payment forms part of the application. An incorrectly completed instruction may require us to return your application, which could have an adverse effect on the initial purchase price of your investment and could mean your application is rejected.
- The earliest date that any premium from whatever source will be applied to secure units in the bond is the date of receipt of such premiums at Prudential's Customer Services Office in Stirling.
- You understand that the bond is a long-term investment and that it is not designed for withdrawals to be taken in the short term.
- You understand that this is a With-Profits investment. Details are in the Key Features of Prudential Investment Bond.
- You understand that, where this is a child's bond, any benefits must be applied solely for the benefit of the child.

How we use your personal data

The Prudential Assurance Company Limited, its group companies * and its business partners will use your information together with other information for administration, credit decisions, customer services, marketing and profiling your purchasing preferences. We will pass your information to them (including our service providers and agents) for these purposes. If you are a joint applicant, we will also pass your information to the other joint applicant/s.

For certain products, we may search the files of credit reference agencies that will record any credit searches on your file. This is to help us make credit decisions about you, to prevent fraud, to check your identity and to prevent money laundering. We may disclose details of how you conduct your account to such agencies. The information will be used by other credit grantors for making credit decisions about you and the people with whom you are financially associated, for fraud prevention, money-laundering prevention and occasionally for tracing debtors. This information may be used to recheck these purposes. We will pass your information to any legal or regulatory body if required to do so.

For certain products, we will need to process sensitive personal data such as health data. It may also be necessary, for the above purposes, to transfer your information to countries that provide a different level of data protection from the UK. In such circumstances, we will put a contract in place to ensure your information is protected. By completing and submitting this form, you consent to us processing your sensitive data and to the processing mentioned above.

You have a right to obtain a copy of your personal information (for which we may charge a fee) and to have any inaccuracies corrected by writing to: The Information Risk & Privacy Team, The Prudential Assurance Company Ltd, 3 Sheldon Square, London, W2 6PR. To make sure we follow your instructions correctly and to improve our service to you through training of our staff, we may monitor or record communications.

Acting on someone's behalf?

When giving us information about another person, you confirm that they have appointed you to act on their behalf. This includes providing consent to:

- the processing of their personal and sensitive data
- receive any data protection notices on their behalf
- receive marketing information as indicated.

Marketing choice

We would like to keep you updated with information on our products and services. To do this we would like to contact you by telephone, email or text. If you would not like to be contacted, please tick this box.

* Prudential Assurance Company Limited is part of the Prudential group of companies which at the time of printing includes Prudential UK & Europe, the M&G Investments Group, Prudential Corporation Asia, Jackson National Life, and PPM America Inc (indirect wholly owned subsidiary).

For your own benefit and protection you need to read carefully the documentation provided before signing this form. You also need to read carefully any further documentation provided to you in the future. If there is anything you do not understand please ask us for further information.

Signature of first bond holder/donor

X

Date

Signature of joint bond holder

X

Date

A written copy of the terms and conditions on which the investment will be made, and the completed application form are available on request from Prudential Customer Service Centre, Stirling, FK9 4UE.



www.pru.co.uk

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