

Retirement has more potential with

**PRUDENTIAL**

# 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 8 pages of this form in the enclosed reply paid envelope to:

**Prudential Investment Bond, Customer Services, Stirling FK9 4UE.**

## For office use only

Source Code

W33 1904

PERNO number

1930400

Policy number

## Part 1 – Details of assured – or donor of child's bond

Title Mr  Mrs  Miss  Ms  Other

Forenames (*in full*)

Surname

Sex Male  Female

Marital status

Full postal address

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

Your date of birth

Telephone (*Home*)
Telephone (*Work*)

Your Tax status Taxpayer  Non-Taxpayer

Please tick here if you are a UK Prudential employee with an existing bond with staff terms.

Existing policy number



### Part 3 – Details of child – child's bond only

When the bond is taken out, the maximum age of the child (at next birthday) is 16 years. The donor must be the parent of the child for regular savings without a lump sum investment.

Forenames

Surname

Child's date of birth

D	D	M	M	Y	Y	Y	Y
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Sex

Male

Female

Full postal address

	Postcode

### Part 4 – Starting regular savings

I would like to start saving monthly amounts into a Prudential Investment Bond of:

£

Please tell us the day you would like the amount to be deducted from your bank or building society each month.

1st

8th

15th

22nd

Anticipated term

years

**Please complete the Direct Debit form overleaf**

The minimum monthly amount is £50.

Minimum 5 years.

## Part 5 – Investing a lump sum

Minimum amount is £5,000 if investing a lump sum only.  
Minimum amount is £300 if also making regular savings.

Minimum 5 years.

If joint application please provide details for both applicants.

Not applicable to corporate/trustee applicants.

Lump sum investments will be divided into a number of separate identical policies.

**I would like to invest the following lump sum into a Prudential Investment Bond:**

£

Anticipated term  years

Please provide details for all lump sum investments over £10,000 to help us to fulfil our regulatory and legislative financial crime prevention obligations.

Occupation

Annual income (including pension – if applicable)

£

Occupation  
(For joint applicants)

Annual income (including pension – if applicable)  
(For joint applicants)

£

Source of funds for this investment

  

(e.g. a UK bank account in own name)

Source of wealth

  

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

## Part 6 – Details of existing Prudential policies

Please give details of all Prudential policies you hold which are still in force. Details can be found on your policy document(s).

Policy number(s)

## Part 7 – Declaration

Please read the following declaration carefully and sign below.

- › I/We understand that Prudential Investment 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.
- › I/We have received/read a copy of the 'Key Features of Prudential Investment Bond' and understand its content.
- › I/We are aware of the situation regarding any future possible tax liability (under current legislation). Details are in the 'Key Features of Prudential Investment Bond'.
- › (Child's Bond only) My/Our intention in effecting this assurance is that the bond shall be for the sole benefit of the child and I/we request that the bond may be prepared in such a form as to give effect to that intention.
- › I/We understand that a Market Value Reduction may be applied in certain circumstances.
- › 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.
- › I/We understand that the bond is a long-term investment and that withdrawals should not be taken in the short-term.
- › Please note that the payment forms part of the application. An incorrectly completed payment instruction may require us to return your application, which could have an adverse effect on the initial purchase price of your investment and/or reject your application.
- › I/We understand that a copy of this completed application form and the Terms and Conditions are available on request.

Signature (*First applicant*)

Date

D	D	M	M	Y	Y	Y	Y
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Signature (*Second applicant*)

Date

D	D	M	M	Y	Y	Y	Y
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## Part 8 – 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 data
- receive any data protection notices on their behalf
- receive marketing information as indicated.

### Marketing choice

We would like to keep you up to date with information on our products and services. To do this, we would like to contact you by telephone, post, e-mail 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).

Signature (*First applicant*)

Date

D	D	M	M	Y	Y	Y	Y
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Signature (*Second applicant*)

Date

D	D	M	M	Y	Y	Y	Y
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A copy of this completed application form and the policy conditions are available on request from our Customer Services office in Stirling.

## Part 9

When you have completed Steps 1 – 7 please make sure you have signed both the application form and the Direct Debit Form and then return to us at:

**Prudential Investment Bond, Customer Services, Stirling FK9 4UE**

If you have any queries while completing your form, please call us on **0845 640 2000** between 8am and 6pm Monday to Friday.



Please fill in the whole form and send it to:  
**Prudential, Stirling, FK9 4UE.**

Name and Full postal address of your Bank or Building Society

To: The Manager	Bank/Building Society
Address	
Postcode	

Name(s) of Account Holder (s)


Bank/Building Society account number

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Branch Sort Code (from top right hand corner of your cheque)

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Prudential's Reference Number/Policy Number

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**INSTRUCTION TO YOUR BANK TO PAY DIRECT DEBITS**

Originator's Identification Number

9	4	0	3	3	7
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**Instruction to your Bank or Building Society**

Please pay **Prudential Direct Debits** from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.

**I understand that this Instruction may remain with Prudential and, if so, details will be passed electronically to my Bank/Building Society.**

Signature(s)

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Date

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Signature(s)

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Date

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**Banks and Building Societies may not accept Direct Debit Instructions from some types of account.**

This is not part of the Instruction to your Bank or Building Society and must be detached by Prudential before submission to the Paying Bank.

\* If payments are to be made from an account other than the policyholder's, please also provide details of the payer's Full postal address.

Calls to Prudential may be recorded or monitored to improve our service.

**This guarantee should be detached and retained by the Payer.**

## The Direct Debit Guarantee



- This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank and Building Society.
- If the amounts to be paid or the payment dates change, Prudential will notify you at least 5 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Prudential or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us.

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[www.pru.co.uk](http://www.pru.co.uk)

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SRSF0033a 10/2009

## The Direct Debit Guarantee