

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.

If "Other", please state title.

Either: PLC, Limited Company, Unlimited Company, Partnership, Sole Trader, Charity, Friendly Society, Public Sector or Other (please specify).

Personal Pension

The Prudential Personal Pension Scheme

About this form

If you have any questions about this form, you can call us free on **0800 000 000** between 8am and 6pm Monday to Friday. Calls may be monitored or recorded for quality and security purposes.

Please return this form to: **FREEPOST Prudential, Stirling FK9 4UE.**

Details of Proposer/Member

Full name

Policy number

Declaration

I hereby nominate the beneficiary (or beneficiaries) named below to receive any lump sum payable on my death, in respect of the benefit(s) selected immediately below. (Please tick the appropriate boxes). If you wish to nominate a different beneficiary (or beneficiaries) for separate benefits please complete separate forms.

- a) All eligible lump sum benefits* and Life Cover benefits.
- b) All eligible lump sum benefits* only.
- c) All Life Cover benefits only.
- d) Contracted-out benefits.

* In this context "eligible lump sum benefits" refers to the sum(s) payable on death where Prudential's discretion as to the beneficiary(ies) applies.

I understand that payment will be determined in accordance with the Scheme Rules and Provisions, and remains subject to the overriding power vested in the Prudential as Scheme Administrator. This nomination cancels, in the entirety, any previous nomination made in respect of the above selected benefit(s) under this scheme.

How we use your personal data

For certain products we will need to process sensitive personal data such as health data. By signing and returning this form, you consent to us processing your sensitive data.

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

Date

D	D	M	M	Y	Y	Y	Y
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Details of beneficiaries

(If there are more than two beneficiaries, please enter details on a separate piece of paper and return with this form.)

Full name	Title	Full name	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Relationship (if any)

Proportion of benefit (fraction) if more than one beneficiary

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Relationship (if any)

Proportion of benefit (fraction) if more than one beneficiary

- (i) In the event of your death as a member of this scheme, lump sum benefits can arise which are payable by the Administrator to one or more beneficiaries as it thinks fit. These may include one or more of your relatives, dependants, or individuals entitled to an interest in your estate, or your Legal Personal Representative. In addition, under the Prudential Personal Pension Scheme, the lump sum Life Cover benefit (where effected) is similarly payable at the discretion of the Administrator. You may nominate, for the consideration of the Administrator, the person or persons to whom you wish the sum(s) to be paid in the event of your death. This will assist the Prudential as Scheme Administrator in its deliberations.
- (ii) Under present law and practice, payment made under the exercise of such discretion, is not normally liable to Inheritance Tax.
- (iii) A form of nomination is advisable in all cases but is particularly relevant if you would like all or part of the benefits paid to a person or persons whom the Administrator, having no close knowledge of your private circumstances, might otherwise overlook.
- (iv) When making a nomination in respect of a Personal Pension having a combination of Pension and Life Cover benefit, you may wish to consider these separately. For example, the Life Cover benefit may be intended to be used towards the repayment of a mortgage in the event of your death. You should submit two nomination forms if you wish to make separate nominations in respect of the Pension and Life Cover benefits.

- (v) It is possible to amend the details of a nomination at any time by notification to the Scheme Administrator, but this should be given special consideration in the event of your circumstances changing (for example, on marriage or on the death of a nominated beneficiary).
- (vi) Please note that the rules governing the payment of death benefits differ according to the type of benefits within your pension plan e.g. contracted-out of SERPS/State Second Pension or your own/employer's payments. Where benefits relate to your own and your employer's payments, Prudential will take your wishes into account, but has ultimate discretion over who receives death benefits.
If your pension plan includes contracted-out benefits and/or a transfer of previous contracted-out benefits, there may be no choice as to the form of benefits. If you are married, it may be that the value of those benefits will have to be used to buy a pension for your widow or widower or civil partner. If, however, there is a choice, we will automatically follow your wishes.
We do not have any discretion over who receives lump sum death benefits in respect of contracted-out benefits. You should submit two nomination forms if you wish to make a separate nomination for contracted-out benefits.
- (vii) I understand that, if for any reason it is not possible to pay the death benefit as a pension to the above person, Prudential will select a beneficiary and will normally pay the benefit as a lump sum under its discretionary powers.

www.pru.co.uk

A copy of our Terms and Conditions and completed Application Form are available on request.

'Prudential' is a trading name of The Prudential Assurance Company Limited, which is registered in England and Wales. This name is also used by other companies within the Prudential Group, which between them provide a range of financial products including life assurance, pensions, savings and investment products. Registered Office at Laurence Pountney Hill, London EC4R 0HH. Registered number 15454. Authorised and regulated by the Financial Services Authority.