



APPLICATION FORM

TUC Stakeholder Pension Scheme
part of the Civil Service partnership pension account



This section is for use by Authorised Employer/Pensions Administration Centre (APAC) only

Employer payroll code	<input type="text"/> / <input type="text"/>
Annual pensionable earnings	£ <input type="text"/>
Payroll reference	<input type="text"/>
Age related	<input type="text"/> %
Matching	<input type="text"/> %
Total	<input type="text"/> %
Date of first salary deduction. (DD/MM/YY)	<input type="text"/> / <input type="text"/> / <input type="text"/>
Checked and approved	<input type="text"/>
Date (DD/MM/YY)	<input type="text"/> / <input type="text"/> / <input type="text"/>

Please refer to the Guidance Notes to help you complete this application.

Part 1. Your personal details (see Guidance Note 1)

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Other (please state) <input type="text"/>					
Last name	<input type="text"/>								
First name(s)	<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"/>
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"/>	<input type="text"/>
Gender	Male <input type="checkbox"/>	Female <input type="checkbox"/>							
Marital status	Single <input type="checkbox"/>	Married <input type="checkbox"/>	Widowed <input type="checkbox"/>	Divorced <input type="checkbox"/>					
Other (please state)	<input type="text"/>								

Part 2. Your contact information (see Guidance Note 2)

Day telephone number	<input type="text"/>		
Evening telephone number	<input type="text"/>		
E-mail address	<input type="text"/>		
Preferred method of contact (please tick box)			
Day telephone number	<input type="checkbox"/>	Evening telephone number	<input type="checkbox"/>
E-mail	<input type="checkbox"/>	Post	<input type="checkbox"/>
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	Postcode		

Part 3. Payments (see Guidance Note 3)

Chosen pension date	Age	<input type="text"/>
	or 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"/>
Your regular % of salary	<input type="text"/> %	

Your employer will pay a contribution to your pension from 3% to 12.5% of your pensionable earnings depending on your age. You do not have to contribute anything to your pension to open a partnership pension account but if you do your employer will also match up to a further 3% of your pensionable earnings. This is as well as the age related employer contribution. You can find more details of this in the Member's Brochure in the joiner's pack.

Your payments will be deducted from your pensionable earnings. This will normally start within one month of the authorisation of your application by your Employer/APAC.

Once you are a member you can if you wish make a single payment to your pension. If you would like to do this please contact the TUC Stakeholder Pension helpline on: 0845 070 6666 between 8.30am – 6pm Monday to Friday. Calls may be monitored or recorded for quality and security purposes.

Part 4. Your employment details (see Guidance Note 4)

	Employer's name	<input type="text"/>
	Employment status	
	Employed – income being received from current employment	<input type="checkbox"/>
	Self-employed	<input type="checkbox"/>

Part 5. Contracting-out of the State Second Pension (see Guidance Note 5)

	Do you want more information on contracting-out of the State Second Pension?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Part 6. Your investment funds (see Guidance Note 6)

	I wish to make payments into the following fund(s):		
	Fund Manager	Fund Name	Amount to be allocated
	<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"/>	<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"/> %
Total 100%			
If no fund is selected all payments will be made into the default fund, which is the Lifestyle Option.			

Part 7. Your beneficiary details (see Guidance Note 7)

Once you are a member, if you wish to nominate a beneficiary for death benefits please contact the TUC Stakeholder Customer Service Centre to obtain a nomination form.

Part 8. Declaration (see Guidance Note 8)

Please read the declarations below and sign in the appropriate place. The completed form will act as an application for tax relief on your payments and some of the information is required for income tax purposes. The giving of false information is a serious offence and would lead to prosecution by HM Revenue & Customs. The penalties are severe.

Some of the details contained in this application will not be relevant to you during your employment with the Civil Service, but may apply if you leave in the future. I apply for membership of the Civil Service partnership pension account (TUC Stakeholder Pension Scheme) and for the relevant arrangements to be established under it.

I understand that:

- one arrangement will be set up to hold payments and benefits that are not related to contracting-out or pension credits;
- any protected rights in respect of contracting-out or transferred in contracting-out benefits will be held separately in an additional arrangement; and
- any pension credits will be held separately in a further additional arrangement.

I understand that this application is subject to acceptance by Prudential and such an acceptance will mean that I am admitted to the scheme. I also agree to be bound by the rules of the scheme and to comply with the terms of the Policy.

I understand that failure to disclose any material fact, if it influences the assessment and acceptance of this application Prudential, may make the plan invalid and that in the event of any doubt as to whether a fact is material, it should be given on this application.

I confirm that I have seen the Key Features document for my plan.

I understand that my plan will be put into force immediately the first payment is received at Prudential's Administrative Head Office and that the continuation of my plan will be dependent upon:

- The satisfactory clearance of the payment through normal banking procedures.
- The application fully meeting Prudential's processing procedures.

I understand that if it is not possible to put my plan into immediate force, any money held in respect of this application will be put into a separate bank account outside the scheme (or that Prudential can, at its option, return any such money). I agree that I will not be entitled to interest on any money so held.

In the event of my death before the chosen pension date, I agree to my funds being disinvested and switched to units of the Prudential Cash Fund (or any successor fund) until the death benefits can be paid out.

In the event of one or more of the investment funds in which payments are invested being withdrawn and a suitable replacement fund not being immediately available, I agree to my funds being disinvested and switched to units of the Prudential Cash Fund (or any successor fund) until my instructions are carried out.

I agree to inform the Trustees immediately if I cease to be a UK resident.

I also confirm that if payments are being made without reference to my net relevant earnings, at some time in the current tax year, I am either:

- Resident or usually resident in the UK, or
- A Crown Servant, working overseas, or
- The spouse or civil partner of a Crown Servant.

I declare that

- to the best of my knowledge and belief, the details given by me in this application are true and complete and agree that the terms of this application, together with Prudential's Acceptance, shall form part of any relevant contracts.
- my total contributions to all UK registered pension schemes (schemes that attract tax relief) will not exceed the higher of
 - (i) my Relevant Earnings (broadly UK taxable earnings directly from a trade, or profession or employment) and
 - (ii) £3,600, if my Relevant Earnings do not exceed £3,600.
- if I cease to be a UK resident, for tax purposes or cease to be eligible for tax relief on any contributions that I am paying (because my earnings have reduced), I will write to Prudential to confirm this before the later of
 - (i) 30 days after the change, and
 - (ii) the 5 April at the end of the tax year when my circumstances change.

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, customer services, marketing and profiling your purchasing preferences. We will pass your information to them (including our service providers and agents) for these purposes. We may also need to disclose your information to the Trustees, sponsoring employer and their scheme advisers for these purposes.

We may search the files of credit reference agencies that will record any searches on your file. This is to help us 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 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).

Signed

Date

Print full name (in block capitals)

The terms and conditions relating to this contract, together with a copy of your completed application form are available upon request.



www.pru.co.uk

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