





---

## 2. Source of money – *continued*

### 2.2 Please let us know the type of pension/annuity to be provided.

Please note that a pension being provided by a defined benefit scheme must be in the form of a scheme pension.

Lifetime annuity     Scheme pension

Please see our scheme pension and lifetime annuity factsheet for more information.

---

### 2.3 Please let us know the type of pension/annuity to be provided for the annuitant's dependant.

If a pension/annuity is to be provided for the annuitant's dependant on the annuitant's death, please tell us what type of pension is to be provided. Please note that a defined benefit scheme can only provide a dependant's pension in the form of a dependant's scheme pension.

Dependant's lifetime annuity     Dependant's scheme pension

---

### 2.4 Please give details of your plan or scheme.

Plan/Scheme name or insurance company

Revenue registration number

Plan/Scheme number

Purchase price

£

Member number in the scheme (if applicable)

Please note that the purchase price must be net of any lump sum payment.

Insurer/Scheme administrator address

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

---

### 2.5 Lifetime allowance information

2.5.1 Where a lifetime annuity is chosen under 2.2 above, please tell us the percentage of any standard lifetime allowance used in taking these benefits, including any tax-free lump sum paid in connection with the annuity.

%

2.5.2 Where a scheme pension is chosen under 2.2 above, please tell us:

the percentage of standard lifetime allowance used in taking the scheme pension (excluding any tax-free lump sum paid)

%

the amount of tax-free lump sum paid in connection with the scheme pension

£

the date of payment/intended date of payment of tax-free lump sum (dd/mm/yyyy)

### 3. Policy details

#### 3.1 Should the policy be written in the name of the annuitant or purchaser?

Annuitant  Purchaser

*If the policy is written in the name of the annuitant, we can't accept any instructions from the scheme trustees or administrators after the policy has been set up.*

#### 3.2 If the policy is to be written in the name of the purchaser, and not the annuitant, who should we make the pension/annuity payments to?

Annuitant  Purchaser

### 4. Payment details

We'll pay the pension/annuity payments to:

Name of bank or building society

Building society roll number (if applicable)

Bank or building society sort code

  -   -  

Account name

Bank or building society account number

*If the annuitant is getting the payments, they'll be taxed at the current basic rate of tax until the Revenue tells us the right code to use.*

### 5. Pensions and divorce

#### 5.1 Is any part of the purchase price subject to a court order issued under Section 23 of the Matrimonial Causes Act 1973, or Section 8 of the Family Law (Scotland) Act 1985 (in other words, an earmarking order following the member's divorce)?

No

Yes – please include with the application:

a copy of every such court order, including any varying order, together with details of the split of the fund ☒

details from the former husband/wife or civil partner (including any changes) of their address and payment details, ☒ and

if the purchase price includes benefits which were earmarked from a previous scheme, any notices given by the trustees of that scheme to the trustees of the transferring scheme ☒

#### 5.2 Where the purchase price includes an amount of pension credit in terms of Section 29 of the Welfare Reform and Pensions Act 1999 ('the 1999 Act'), please provide the following information:

Amount of pension credit

£

Amount of safeguarded rights included in the pension credit

£



## 6. Purchaser's declaration – *continued*

You may share my information with:

- certain bodies when you legally have to, for example regulatory bodies or authorities such as the Financial Services Authority or the Revenue, and when you need to in order to comply with money laundering laws and for other purposes, for example detecting crime
- people acting on my/our behalf (for example my/our financial adviser) so they can fully carry out their role as my/our agent – you can only share permitted relevant information with them
- other companies in the AEGON UK plc group, who may let me/us know about their new products or services

The AEGON UK plc group means AEGON UK plc and its subsidiary companies (including Scottish Equitable plc, which uses the trading names AEGON Scottish Equitable, AEGON Trustee Solutions and AEGON Actuarial Services).

I/We understand that if I/we do not wish to receive such information, I/we should tick this box.

I/We can find more information about this in your leaflet *Protecting your personal information*.

Date (dd/mm/yyyy)

Signature of purchaser

Date (dd/mm/yyyy)

Signature of annuitant

***It is really important that the relevant people sign this section before you return the form to us.***

*We will start providing the pension/annuity once we have received everything we need and the purchase price. If you want to see an example of the standard policy conditions and a copy of the completed application form, just ask us.*

## 7. Financial adviser's details

### For financial adviser use only

Financial adviser case number

Did you give this applicant advice when choosing to set up this policy?

Yes  No

This is for the purposes of Financial Services Authority reporting.

Phone number

Fax number

Email address

Do you want us to do the conveyancing for you?

Yes  No

Date (dd/mm/yyyy)

Name

Signature of financial adviser