

Immediate Life Annuity Application



It is an FSA requirement that we provide data as to whether advice was given on the sale of this product.

Was financial advice given?

Yes No

Tick one

THIS QUESTION IS TO BE COMPLETED BY THE ADVISER ONLY

Please read these notes before completing your application

- These notes have been prepared to help you save time when completing this application form. Only the minimum number of questions are asked so that you can begin to benefit from your annuity without delay. Please answer all questions fully, do not use dashes; tick boxes where appropriate. It is important that your answers are accurate to the best of your knowledge.
- One life**
Where the annuitant is also the applicant, sections 1, 4, 5 and 6 should be completed.
Where the annuitant is different from the applicant, sections 1, 3, 4, 5 and 6 should be completed.
- Two lives**
Where the annuitants are also the applicant(s), sections 1, 2, 4, 5 and 6 should be completed.
Where the annuitants are different from the applicant(s), all sections should be completed.
- It is important that you complete section 4 carefully, as this advises us of the type of Annuity Plan required. If you are in any doubt, you should consult your financial adviser.
- It is imperative that you also complete and return the enclosed PLA6 tax form. This will enable us to approach HM Revenue & Customs to obtain approval for your annuity to be treated as a Purchased Life Annuity.

Single applicants

Longest life annuity effected by a single policyholder.

Points to be considered:

- The person who is not the policyholder has no rights whatsoever under the contract.
- If the policyholder dies first the annuity payments will be retained by Aviva pending the production of a grant of legal representation on receipt of which they will be made to the legal personal representatives; therefore the policyholder should consider:
 - Making the necessary provision in his/her will if it is the intention for the payments after his/her death to be made to the survivor.
 - The possible effects of any delay in making annuity payments following death if they are used to fund premiums under a life assurance policy.

For further advice on the above please consult your financial adviser.

Joint applicants

In accordance with HM Revenue & Customs instruction, if there are joint applicants who pay income tax, Aviva will deduct tax at the appropriate rate. In circumstances where either or both applicants are not liable to income tax, they should refer to Aviva to establish their liability under the proposed plan.

1 Personal details of single/first annuitant

Surname	<input type="text"/>			<i>Mr/Mrs/Miss/Ms/title</i>
Forename(s)	<input type="text"/>			
Present address	<input type="text"/>			
	<input type="text"/>			
	<input type="text"/>			<i>Postcode</i>
Daytime telephone number	<input type="text"/>			
Date of birth	<input type="text"/>	Age	<input type="text"/>	
Evidence of age is required at outset				
National Insurance number	<input type="text"/>			

2 Personal details of second annuitant

Surname	<input type="text"/>			<i>Mr/Mrs/Miss/Ms/title</i>
Forename(s)	<input type="text"/>			
Present address	<input type="text"/>			
	<input type="text"/>			
	<input type="text"/>			<i>Postcode</i>
Daytime telephone number	<input type="text"/>			
Date of birth	<input type="text"/>	Age	<input type="text"/>	
Evidence of age is required at outset				
National Insurance number	<input type="text"/>			

continued

3 Personal details of applicant(s) – if different from annuitant(s)

Surname	<input type="text"/>	<i>Mr/Mrs/Miss/Ms/title</i>
Forename(s)	<input type="text"/>	
Surname	<input type="text"/>	<i>Mr/Mrs/Miss/Ms/title</i>
Forename(s)	<input type="text"/>	
Surname	<input type="text"/>	<i>Mr/Mrs/Miss/Ms/title</i>
Forename(s)	<input type="text"/>	
Address for communications	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	
Daytime telephone number	<input type="text"/>	

4 Details of annuity required

1 Purchase price, by cheque payable to Aviva £

Please make your cheque payable to Aviva. If you wish to pay with a Building Society cheque or Bankers Draft, the Society or Bank must endorse the cheque with the full name of the person whose account from which the funds are drawn. For example, the cheque should be made payable as follows: Aviva i.r.o. John Smith (include investor's full name).

2 Gross annuity each year £

To be paid *tick appropriate box* yearly half-yearly quarterly monthly

With payments *tick appropriate box* in arrears in advance

i. escalating at % pa *if appropriate*

ii. reducing by % on death *if appropriate*

3 If annuity is to be payable for a guaranteed period and thereafter during the life of the annuitants, give number of years.

Guaranteed *tick appropriate box* 5 years 10 years

4 Is the annuity to be Capital Protected? yes no

5 Do you pay income tax? yes no

6 Has a proposal ever been made to Aviva on the life/lives of the annuitant(s)? yes no

If pension scheme is involved please give name of firm

7 Is this annuity being purchased pursuant to a Will, Trust or Settlement or in connection with a pension scheme? yes no If 'yes' please give details

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