

Annuities

Annuity Quotation Request

To be completed in conjunction with our medical form.

Please tick how you would like this quotation sent to you Telephone Fax E-mail Post

Contact Name FSA Firm Reference No.

Network/Marketing/
Support Group Name

Company Name Postcode

E-Mail:

Telephone No. Fax No.

Commission (paid on net fund value) My Standard Rate or Fee £ Fee %

Part 1 Client details	Annuitant	Dependant (if applicable)
Name	<input type="text"/>	<input type="text"/>
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Permanent Residential Address	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
Date of birth (DD/MM/YY)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Age Attained	<input type="text"/>	<input type="text"/>
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Civil Partner <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Civil Partner <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed
Does Transitional Protection Apply?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Quote Request Form continues on next page...

Contact Details

Tel: 0845 302 2287 Fax: 0845 301 2287

Lines are open Monday – Friday, 8.30am to 5.30pm.

Part 2 Pension details

Client Name

	Source 1	Source 2	Source 3
Policy Type (delete as applicable)	<input type="text" value="SP / LA / IVP"/>	<input type="text" value="SP / LA / IVP"/>	<input type="text" value="SP / LA / IVP"/>
Annuity Start Date (SP & LA only)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Scheme Type ¹ (Compulsory)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ceding Scheme Provider Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pension Fund Value	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>

Where funds contain Defined Benefits, please provide a breakdown as follows:

Pre 97 NCOR ³	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
Pre 88 GMP ²	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
Post 88 GMP ²	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
COSR 97-05 or NCOR 97-05 (DB Only) ^{2,3}	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
Post 05 COSR or Post 05 NCOR (DB Only) ^{2,3}	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
PCLS £ or % (IVP only)	<input type="text" value="£"/> <input type="text" value=""/>	<input type="text" value="£"/> <input type="text" value=""/>	<input type="text" value="£"/> <input type="text" value=""/>
Do funds arise from the death of a spouse?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are funds in relation to a Pension Sharing Order on divorce?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, are these pension benefits already in payment?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Frequency	<input type="checkbox"/> Annually	<input type="checkbox"/> Half Yearly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Monthly
Paid	<input type="checkbox"/> In Advance	<input type="checkbox"/> In Arrears With Proportion	<input type="checkbox"/> In Arrears Without Proportion	
Dependant	<input type="checkbox"/> Without	<input type="checkbox"/> 50%	<input type="checkbox"/> 66.67%	<input type="checkbox"/> 100% Other (please specify) <input type="text"/>
Escalation	<input type="checkbox"/> Level	<input type="checkbox"/> 3%	<input type="checkbox"/> 5%	<input type="checkbox"/> RPI No Floor <input type="checkbox"/> RPI Zero Floor
	<input type="checkbox"/> LPI 5%	<input type="checkbox"/> LPI 2.5%	Other (please specify) <input type="text"/>	
Guarantee ⁴	<input type="checkbox"/> None	<input type="checkbox"/> 5 Years	<input type="checkbox"/> 10 Years	Other (please specify) <input type="text"/>
Overlap	<input type="checkbox"/> With	<input type="checkbox"/> Without		
Value Protection ⁴	<input type="checkbox"/> None	<input type="checkbox"/> 50%	<input type="checkbox"/> 75%	<input type="checkbox"/> 100% Other (please specify) <input type="text"/>
Value Protection paid on death of (Joint Life only)	<input type="checkbox"/> Annuitant	<input type="checkbox"/> Second Death		

¹ If funds are arising from a Defined Benefit, Final Salary, Section 32 or Hybrid scheme, please also provide a copy of a Benefit Statement from the Ceding Scheme.

² Please specify whether you have provided a Cash Equivalent Transfer Value or the annual income amount required. ³ COSR = Contracted Out Salary Related.

NCOR = Non Contracted Out Rights (delete as applicable). ⁴ Please choose either a Guarantee period or Value Protection as both options together are not permitted.

Lifetime Annuity (LA)

If funds are from any form of Defined Contribution pension arrangement and you are using the Open Market Option to choose the annuity provider, the receiving scheme is a Lifetime Annuity (LA). The current pension scheme will pay the Pension Commencement Lump Sum (PCLS).

Scheme Pension (SP)

If funds are from a Defined Benefit pension scheme the receiving scheme will be a Scheme Pension (SP). Defined Contribution pension schemes may also choose to purchase a Scheme Pension instead of a Lifetime Annuity.

Immediate Vesting Pension (IVP)

If the whole pension fund is to be transferred into the Just Retirement Pension Scheme, funds will then become subject to the scheme rules of the Just Retirement Pension Scheme and not those of the current pension provider. Just Retirement will pay the Pension Commencement Lump Sum. **Please note tax-free cash protection may be lost on transfer of the pension fund to the Immediate Vesting Pension.**