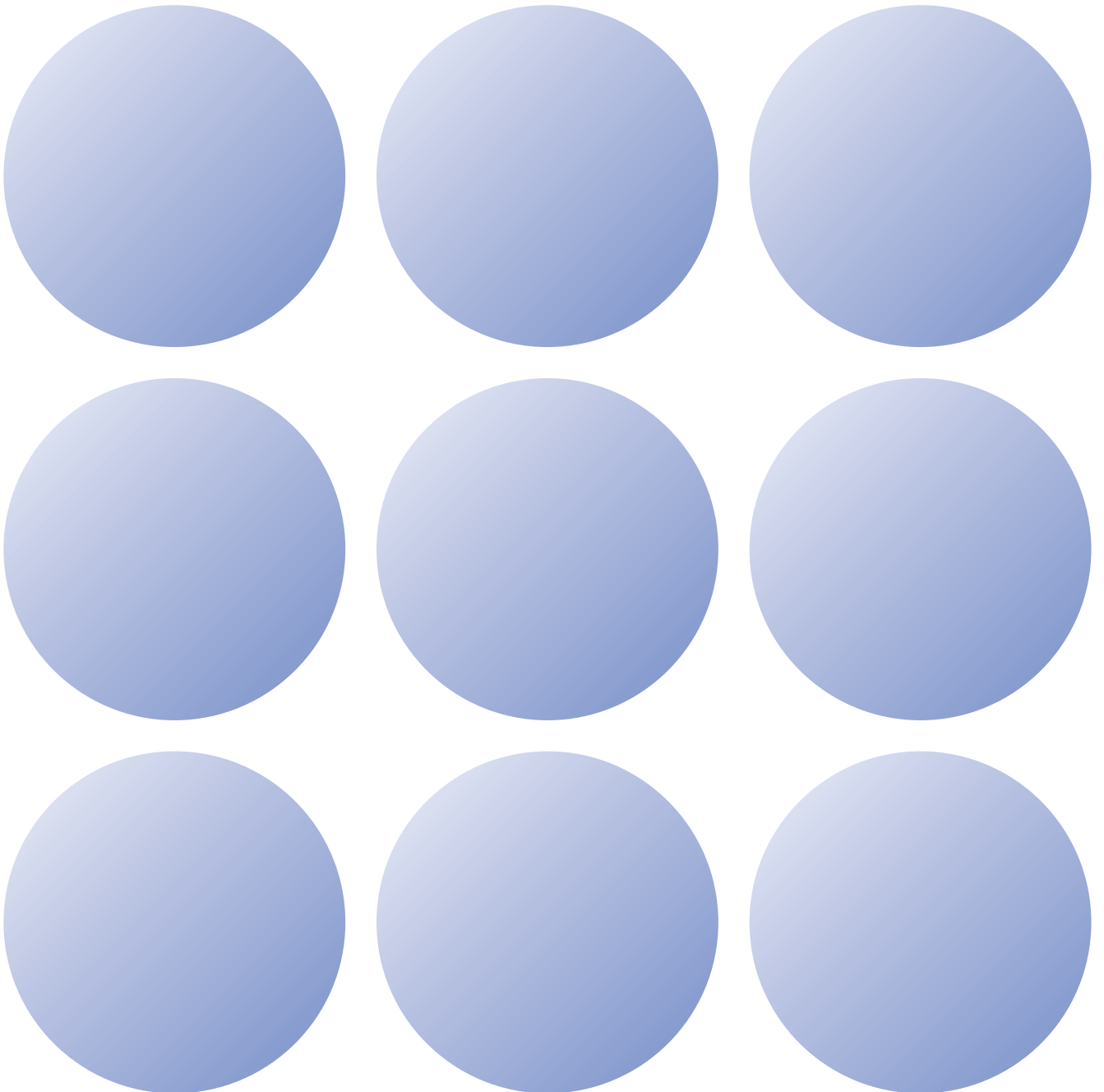


Tax-free cash entitlement



4 Other pensions with the named employer

Do you have any **other** pension arrangements from your service with the employer named in Section 1?

If No, please go to Section 5. If Yes, please complete the table below.

Yes No

Please include any schemes that have been transferred to either a personal pension plan or a buy out plan.

You can get these details by contacting your pension provider for that particular scheme.

If your pension provider for that scheme is Zurich, please write Zurich and the plan number in the pension provider box and we will complete the details.

Pension provider and plan number	*Type of scheme	Start date of the plan	Details as at 5 April 2006			
			Fund value £	Tax-free cash payable# £	Yearly pension payable** £	Yearly pension in payment † £

* for example occupational scheme, final salary scheme, FSAVC, PPP, buy out plan, retirement annuity contract (RAC).

We need the HMRC maximum tax-free cash as calculated by the pension provider before proportioning.

** Only applicable for Final Salary Schemes that are not already in payment. Please quote the annual amount.

† Pension you are already taking.

5 Pensions from previous employers

a) Do you have any other pension arrangements from your service previous to the employer named in Section 1? If No, please go to Section 6

Yes No

b) Were your P60 earnings for 2004/05 £50,000 or less** from the employer named in section 1? If Yes, please go to Section 6.

Yes No

**If these earnings were only for part of 2004/05, then please scale it up into an annual figure.

c) Did you leave service of the employer named in Section 1 before 6 April 2004 and were your P60 earnings in the last complete year of assessment £25,000 or less?

If Yes, please go to Section 6. If No, please complete the table below with all the details of pensions from previous employers.

Yes No

You can get these details by contacting your pension provider for that particular scheme.

If your pension provider for that scheme is Zurich, please write Zurich and the plan number in the pension provider box and we will complete the details.

Employer	Pension provider and plan number	*Type of scheme	Start date of the plan	Details as at 5 April 2006			
				Fund value on 5 April 2006 £	Tax-free cash payable/ already paid £	Yearly pension payable** £	Yearly pension in payment † £

* for example occupational scheme, final salary scheme, FSAVC, PPP, buy out plan, retirement annuity contract (RAC).

** Only applicable for Final Salary Schemes that are not already in payment. Please quote the annual amount.

† Pension you are already taking.

6 Protection of pension benefits

As the lifetime allowance reduced to £1.5 million on 6 April 2012, it was possible to apply to HM Revenue & Customs before 6 April 2012 for fixed protection to preserve the 2011/2012 lifetime allowance. This can affect the amount of tax-free cash you are entitled to.

Do you have fixed protection?

Yes

No

7 Declaration

We may need to contact your other pension providers in order to calculate your tax-free cash.

I consent to Zurich Assurance Ltd obtaining details of any of my pension benefits from other pension providers or trustees and administrators of my pension schemes. I authorise the giving of such information.

The information provided on this form is true and complete to the best of my knowledge.

Signature

Date

D D M M Y Y Y Y

Print name