

BOOST PRU



PENSION FUNDS
(OPEN FUND) MEMBERS

APPLICATION FORM
FOR THE

PRUDENTIAL
AVC FACILITY

PRUDENTIAL
The Plan from the Pru

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 marketing 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 142 Holborn Bars, London, EC1N 2NH. Registered number 15454.

Name of Scheme

ITB Pension Funds (Open Fund) - PRU AVC Plan

Scheme Reference Number
(Prudential use only)

Four empty boxes for Scheme Reference Number

1. YOUR PERSONAL DETAILS

Title Mr Mrs Miss Other

First name(s)

Last name

N. I. number

Date of birth

Gender Male Female

2. YOUR EMPLOYMENT DETAILS

Employer's name and location

Empty box for Employer's name and location

Position

Empty box for Position

3. CONTRIBUTIONS

I wish to start paying AVCs from?

DDMMYYYY date input

% of salary per month

*Please note that the contribution you have specified is gross of income tax and is the full amount which will be credited to your Prudential AVC fund:

You can pay up to a maximum of 20% of your salary in any one Scheme year (1 April - 31 March) as AVCs.

If you wish to make a lump sum payment. Please State:

£ (Please note the restriction above)

4. YOUR INVESTMENT INSTRUCTIONS

Please indicate below how you would like your contributions to be invested. Details of the funds can be found in the AVC fund information table.

Amount to be allocated

Table with 2 columns: Fund Manager, Fund Name, and Amount to be allocated (%)

TOTAL 100%

OR

100% Lifestyle option (tick box) and Your target retirement age is? input

Please ensure that the proportions you have indicated add up to 100%. If this section is not complete, this application form will be returned to you by the ITB Pension Funds Office and investment of your AVCs will be delayed as a result.

5. IMPORTANT NOTICE

In applying to join this facility, you should understand and accept that:

- a. your employer does not accept responsibility for the accuracy of any statements or representations made in Prudential's literature;
b. because individual circumstances vary, you should consider carefully whether contributing to this AVC facility is in your best interests;
c. because the facility is a way of investing money in order to provide pension benefits, those benefits will depend on the contributions paid, the performance of the investments and on interest rates at retirement; and therefore there is no guarantee that any particular level of benefit will be available at retirement;
d. you may vary or cease your contributions at any time in the future but you have no rights conferred under the Financial Services and Markets Act 2000 and cannot therefore cancel your application retrospectively.

6. DECLARATION

I authorise the deductions from my earnings of any level of Additional Voluntary Contributions (AVCs) specified above.

I declare that the total of my contributions does not exceed the limits described in Part 3

DATA PROTECTION

Prudential and its other group companies* will use the personal details and information you have given on this form (together with any other information) for the provision of servicing, administration, risk assessment, fraud prevention and regulatory purposes.

Please also note that you have a right to apply for a copy of your personal information (for which we may charge a fee) and to have any inaccuracies corrected.

* The list of Prudential companies varies from time to time. The following companies are included within the Prudential group. This list is not exhaustive. Prudential Assurance Company Limited, Prudential Pensions Limited, Prudential Group Pensions Limited, Prudential M&G Asset Management Limited, Prudential Banking plc, M&G Limited, Egg plc.

I confirm that to the best of my knowledge and belief, the details given on the application form are correct and complete.

Your signature and Date input fields

Print full name (in block capitals)

Empty box for Print full name

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

MEMBER ACTION

Once completed please send to your Employer for processing.

EMPLOYER ACTION

Once processed for payroll deduction please send this form to the ITB Pension Funds, 23 King Street, Watford WD18 0BJ.