



Please complete this form using Adobe Acrobat Reader and then print it, sign it and return it to us. Press 'Tab' key to move between fields. Compulsory fields are marked in red.

REQUEST TO FUNDS' OFFICE TO SOURCE SAMPLE ANNUITY QUOTATIONS FOR ADDITIONAL PENSION BENEFITS TO BE SECURED OUTSIDE THE ITB SCHEME

HOW TO COMPLETE THIS FORM

Employer to complete and forward to the Pension Funds Office, 23 King Street, Watford Herts WD18 0BJ.

COMPLETED ON BEHALF OF (EMPLOYER)

ANNUITY QUOTATION SOUGHT ON BEHALF OF: MEMBER'S SURNAME AND INITIALS: (BLOCK CAPITALS)

DATE OF BIRTH: NATIONAL INSURANCE NO:

IS MEMBER IN GOOD HEALTH: YES/NO SPOUSE'S DATE OF BIRTH:

SMOKER

NON-SMOKER

DATE OF WITHDRAWAL:

QUOTATION REQUIRED ON FOLLOWING BASIS (TICK APPROPRIATE BOX(ES)):

Amount of additional pension that can be provided by a payment of £

Cost of an additional pension of £ pa

Cost of providing pension equivalent of __ years _ _ months

Requested by:

Name:

Designation: **Date :**

Note: (i) On receipt of this request the Funds' Office will undertake to source sample annuity quotations both including and excluding pension increases and including and excluding spouse's pension for Employer to consider. It should be appreciated that annuity rates fluctuate with market conditions and are generally guaranteed for a period of only 14 days after the issue of a firm quotation

(ii) If wishing to proceed with annuity purchase the Funds' Office will arrange to provide a firm quotation