Part 2 Financial Details

PENSIONS (including SERPS but excluding Basic State Pensions) - Additional Page

Additional Page		Of	

2.13 Give details of your pension interests (whether or not in payment).

Documentation required for attachment to this section:
a) A recent statement showing the cash equivalent value (CEV) provided by the trustees or managers of each pension arrangement.
b) If any valuation is not available, give the estimated date when it will be available and attach a copy of your letter to the pension company or administrators from whom the information was sought.
c) Pension Protection Fund ("PPF") compensation entitlement for any scheme you were a member of which has transferred to PPF.

If you have made additional voluntary contributions to any other plan or scheme, you must give the information separately if the benefits referable to such contributions are separately recorded or paid.

Name and address of scheme, plan or policy or PPF Board.	
Name of scheme, plan or policy or PPF compensation reference number.	
Type of scheme, plan or policy (e.g. final salary, money purchase, PPF or other).	
Earliest date when the benefit can be taken.	
Bid or cash equivalent value or PPF valuation of those rights.	
Date the CEV or PPF valuation was calculated	
Is the pension in payment or drawdown, or deferred?	✔ Yes ☐ No
If the arrangement is an occupational pension that is paying reduced CEV, please quote what the CEV would have been if nor reduced. if this is not possible, please indicate if the CEV quoted is a reduced CEV.	
Is the PPF compensation capped? if so, provide full details.	

The lump sum payable on death before retirement	
The lump sum payable on death after retirement	
The lump sum payable on leaving active membership of the scheme but before retirement	
The estimated maximum lump payable on retirement (if known) assuming you take the maximum lump sum	
Your estimated monthly pension on retirement (if known)	
Spouse's/civil partner's or dependant's pension on your death in service	
Spouse's/civil partner's or dependant's pension on your death in retirement	
State whether such pension would be lost on divorce	☑ **Yes** ☐ **No**
TOTAL value of your pension assets Bid or transfer value	£ 0.00

Include this total on page 19 of the Affidavit of Means form under the total value of your pension assets from additional pages.