

# FAMILY SUNTRUST

## CONTINGENT DEPENDANT SCHEME PENSION

Phoenix Wealth, Self Invested Pensions, PO Box 1394, Peterborough, PE2 2TQ.

### When to use this form

This form should be completed by:

- Dependants to provide the Scheme Administrator with instructions about how their Scheme Pension should be paid.

### 1. FAMILY SUNTRUST SCHEME DETAILS

<b>Scheme name</b>	Family Suntrust Scheme (the 'Scheme')
<b>Scheme number</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Illustration reference</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Dependant's full name</b>	

### 2. INCOME PAYMENT DETAILS

Please complete the table to confirm the income payment details.

<b>Amount</b>	<input type="checkbox"/> Maximum <input type="checkbox"/> Minimum            £ <input type="text"/> Specific
<b>Payment start date</b> (between 1st and 28th)	<input type="checkbox"/> As soon as possible <b>or</b> On the following date: <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/>
<b>Payment frequency</b>	<input type="checkbox"/> Half-yearly <input type="checkbox"/> Yearly
<b>Rate of increase</b>	<input type="checkbox"/> Not increasing <input type="checkbox"/> 3% <input type="checkbox"/> 5%

### 3. BANK ACCOUNT DETAILS

Please complete the table to confirm the bank/building society you wish pension payments to be made to. We can only make payment to an account in your name. The **name of the account holder** you enter in this section must be exactly the same as it appears on your account as we'll use it when we process the payment. The receiving bank may check the name so any discrepancies could result in a rejection of, or a delay to, the payment.

<b>Name and address of bank/ building society</b> (including postcode)	
<b>Bank/building society account number</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Bank sort code</b>	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>
<b>Building society roll number</b> (taken from savings book)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Full name of account holder</b>	

### 4. DECLARATION AND CONSENT

**I understand that:**

- this application form is my instruction to the Scheme Administrator to make payments under the Scheme.
- the Participants must ensure there is sufficient available cash in the Scheme cash account before benefits can be paid.

**I confirm that:**

- to the best of my knowledge and belief, the information given in this application, including those not in my handwriting, are correct and complete.

#### Financial Crime (verifying your identity to prevent Fraud & Money Laundering)

To verify your identity and prevent financial crime we may use and share your information with any company within the Phoenix Group, with companies who work for us and with appropriate organisations.

We may also search, send your details to, and use information from third party verification service providers and financial crime and credit reference agencies (Third Parties). This involves checking your details against databases these Third Parties use. The Phoenix Group and these Third Parties may keep a record of the search, the results of the search, any suspicions of financial crime and the details may be used to assist other companies for verification and identification purposes. This search is not a credit check and your credit rating should be unaffected.

By signing this form you are giving your consent to these activities which will make it easier for you to do business with us and help prevent financial crime. For more information, please write to the Money Laundering Reporting Officer, 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

Signature:

x

Date:

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