

## **Member Declaration – to be read and agreed by the client**

**It is a serious offence to make false statements. The penalties are severe and could lead to Prosecution**

1) I apply to vary my contributions to the Wealth Personal Pension Scheme A ("the Scheme") and agree that such contributions will be held subject to the Rules of the Scheme and the Retirement Wealth Account Terms & Conditions/The Personal Pension Policy Provisions that currently apply to my plan.

2) I understand that I can only make tax relievab le member contributions to my Plan and that any non tax relievab le member contributions will be refunded.

3) I declare that the total contribution to be paid by me or on my behalf to my Plan together with any other registered pension scheme in any tax year will not exceed the greater of:

- the 'basic amount' and
- the amount of my relevant UK earnings that is chargeable to income tax for the relevant tax year.

4) I will write to Phoenix Wealth to let you know, by the following 5 April if any event occurs as a result of which I am no longer entitled to tax relief on my contributions. (If the change happens after 8 March, you have 30 days to write to us.)

5) I confirm, to the best of my knowledge and belief, the statements made in this form, including those not in my handwriting, are correct and complete.

6) I declare that contributions will cease by my 75th birthday.

7) I confirm that I have earnings on which UK tax may have to be paid or I am a relevant UK individual.

8) I confirm that my financial adviser has provided me with all the relevant supporting documentation available and that I have been able to make an informed decision based on my personal circumstances.

## 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.

'Phoenix Wealth' (comprising of the companies Winterthur Life UK Holdings Limited, AXA Wealth Services Limited, AXA Wealth Limited, AXA Trustee Services Limited and AXA Sun Life Direct Limited) has been acquired by Pearl Life Holdings Limited (and now forms part of the Phoenix Group - [www.thephoenixgroup.com](http://www.thephoenixgroup.com)).

'AXA' and 'WINTERTHUR' are trademarks that are owned by AXA SA and will be used for a short period under a licence granted by AXA SA to the Phoenix Group. Pearl Life Holdings Limited is registered in England (4560778) at 1 Wythall Green Way, Wythall, Birmingham B47 6WG. As part of Phoenix Group AXA Wealth Limited will continue to be authorised by the Prudential Regulation Authority and regulated by the Prudential Regulation Authority and the Financial Conduct Authority; AXA Wealth Services Limited will continue to be regulated by the Financial Conduct Authority.

Phoenix Wealth, Winterthur Way, Basingstoke RG21 6SZ. Telephone number: 01256 470707. As part of our commitment to quality service and security, telephone calls may be recorded.

These products are provided by AXA Wealth Limited, trading as Phoenix Wealth (no. 01225468). It is also scheme operator of the Retirement Wealth Account Phoenix Wealth Pension Funds Only option and The Personal Pension. Elevate Portfolio Services Limited (no. 01128611) is the scheme operator of the Retirement Wealth Account Self-invested option. AXA Wealth Limited registered office: 1 Wythall Green Way, Wythall, Birmingham, B47 6WG. Elevate Portfolio Services Limited is authorised and regulated by the Financial Conduct Authority. Registered office: 14th Floor, 30 St. Mary Axe, London, England, EC3A 8BF. Both companies are registered in England and are limited by shares.