

Application For EasyBuild Stakeholder Pension

(Please complete all blank boxes using block capitals)

PLEASE RETURN THIS FORM AS SOON AS POSSIBLE AS WE CANNOT ACCEPT ANY CONTRIBUTIONS UNTIL WE RECEIVE YOUR COMPLETED APPLICATION.



1. Your Personal Details

Customer number

Title: (Mr/Mrs/Miss/Ms) Surname

Forenames (in full)

Address

Postcode

Telephone Number Day

Evening

E-Mail Address

National Insurance No

Sex

Date of Birth / /

Age

Occupation

Marital Status

At what age do you expect to retire? (This should be between 50 and 75 years of age. Please note you will not be able to take retirement benefits before age 55 after 5 April 2010.)

2. Employment Status

(Employed/Self Employed/Not Employed/Unemployed)

Tax District

Tax Reference

Employers Name

Address

Post Code

3. Your Eligibility to Invest in a Stakeholder Pension

You must be a relevant UK individual (see Important Note). We cannot accept applications from anyone who is not a relevant UK individual. The amount you can contribute to a Stakeholder Pension Scheme which qualifies for income tax relief is determined by HM Revenue & Customs. Please refer to the enclosed Key Features Document (page 4) for HM Revenue & Customs contribution limits. You may make single "one off" contributions or regular contributions – or both.

If your employer has selected EasyBuild as your Stakeholder Pension, you can pay by payroll deduction.

If your employer has not selected EasyBuild as your Stakeholder Pension, you can pay monthly by direct debit.

To arrange, please complete the appropriate form and return as per the instructions. If you wish to make a lump sum payment by cheque, please complete the box below.

What single amount would you like to invest? £

(Please make your cheque payable to B&CE Insurance Limited and send it to us with this form)

Which fund would you like your contributions invested in? Please refer to the Key Features Document (pages 5 & 6) for investment details. (If you leave the boxes blank your contributions will go into the managed fund.)

Managed %

Cash %

4. Estimated Earnings

Estimated total earnings for the current year, before tax £

5. Your Dependants

Please tell us who you would like to receive the value of your fund if you die before you retire

Title (Mr/Mrs/Miss/Ms)	<input type="text"/>	Surname	<input type="text"/>
Forenames (in full)	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Relationship to you	<input type="text"/>

6. Your Declaration

This application establishes your eligibility to invest in a Stakeholder Pension. This form acts as an application to HM Revenue & Customs for tax relief at the basic rate of income tax on your payments. We will claim this back for you on your behalf. It is a serious offence to make false statements. The penalties are severe and could lead to prosecution by HM Revenue & Customs.

1. I apply to become a member of the B&CE EasyBuild Stakeholder Pension Scheme and agree to be bound by the Rules of the Scheme, and the Policy Conditions.
2. The total investment into this and any other pension arrangements does not exceed the maximum allowable for income tax relief by HM Revenue and Customs. For further details please see the enclosed Key Features document.
3. I will advise B&CE within 30 days if I cease to be a relevant UK individual (see Important Note).
4. To the best of my knowledge and belief the information I have given in this application is true and complete.

I have been provided with a Key Features Document and I have not asked for or received advice from a B&CE representative regarding this contract. I am satisfied that a Stakeholder pension is suitable for my requirements. I have read and understood the rules and conditions shown in this application form and I am eligible to participate in the B&CE EasyBuild Stakeholder Pension Scheme.

Data Protection Act 1998 – Any personal information held by B&CE will be used solely for the marketing of B&CE's own products. It will not be divulged to any other party other than appointed representatives unless required by law or in accordance with the Data Protection Registry. For your security, telephone calls may be recorded and randomly monitored.

I agree that personal information may be held by B&CE and used to inform me of B&CE's other products/services. Please tick the appropriate box(es) if you do not wish to receive further information on B&CE's services by Mail Telephone E-Mail

Signature Date

Please return this form to:

B & C E Insurance Ltd FREEPOST RCC2977 Crawley West Sussex RH10 9BR (No postage required.) If applicable please send your completed Payroll Deduction form direct to your employer.

Important Note: A relevant UK individual meets at least one of the following HMRC conditions: 1.) The individual has relevant UK earnings chargeable to income tax for that year. 2.) The individual is resident for tax purposes in the UK at some time during that year. 3.) The individual was resident in the UK both at some time during the five years immediately before that year and when the individual became a member of the pension scheme. 4.) The individual, or the individual's spouse, has for the tax year general earnings from overseas Crown employment subject to UK tax.

1177_0808