

Takeover Questionnaire

Name of Scheme

HMRC registration number/PSO/
SF Reference Number

Who is the registered Scheme
Administrator

Registration Number:

Who is the registered Scheme
Practitioner

Registration Number:

Please provide details of any benefit
crystallisation events arisen since 5th
April 2006.

Have any non BCE events arisen that
require to be reported on the Event
Return Form. If yes, please provide
some brief details

Have any members applied for
protection against the lifetime
allowance charge. If yes, please provide
some brief details

Do any members have pension commencement lump sums (not in payment) that exceed a quarter of their respective notional funds on 5th April 2006. If yes, please provide some brief details

Signed:

Name:

Please provide your telephone number in the event that we need to speak to you regarding this form

When returning this form please enclose:

(please delete as appropriate)

- | | | |
|----------------------------------------------------|------|-----|
| 1. Member signed nomination of beneficiary forms | Encl | N/A |
| 2. Copy of the accounting for tax form | Encl | N/A |
| 3. Copy of the Event Report Return | Encl | N/A |
| 4. Copy of the Pension Regulator return | Encl | N/A |
| 5. Copy of the most recent pension scheme accounts | Encl | N/A |
| 6. Apportionment of assets statement | Encl | N/A |
| 7. BCE Certificates | Encl | N/A |

Thank you for providing us with this information

Please return this form to:

Daws House
33-35 Daws Lane
London
NW7 4SD

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