

Form Q -PENSION SCAMS QUESTIONNAIRE

To be completed by the planholder
IMPORTANT - THIS FORM MUST BE RETURNED TO US BEFORE
THE TRANSFER CAN GO AHEAD – This is for your protection

Scheme Name:

NPLL PP Scheme No 1

Planholder Name:

Mrs Susan Singleton

Plan number(s)

N02646L 000-000

As a pension provider, Phoenix Life has a duty to protect your pension by looking for signs that your pension is being transferred as part of a pension scam. This could be where:

- a pension is being transferred to an arrangement which allows benefits to be transferred out before the minimum age specified by Her Majesty's Revenue and Customs (HMRC), which is 55;
- a new pension provider promises to pay out tax-free cash which is higher than the HMRC limits;
- a pension loan or cash incentive is offered and the information provided to you is misleading;
- you are not sufficiently warned about large tax charges that you will be personally responsible for; and where
- set-up and ongoing charges are not clearly explained.

The fraud risk when transferring your pension plan is high therefore please ensure you read the transfer pack we have provided carefully as it provides further information in relation to pension scams.

As part of our standard process and to help us monitor the security of your pension we need you to answer the following questions – please provide as much information as you can as it will help us with our investigations (*please indicate as applicable):-

Did the new pension provider or any connected party contact you first? (Cold calling by telephone, post, email, text or door to door)

*Yes / ☒ No (if Yes please provide details below)

Will you be receiving any cash payment, bonus or loan from the new pension provider as a result of transferring your benefits?	*Yes / <input checked="" type="radio"/> No (if Yes please provide details below)
How did you hear about the new pension provider?	Please provide details below FAMILY SSAS SET UP BY FOR MY HUSBAND & ME
Have you been told that you can access any part of your pension under the new pension provider before age 55, other than on grounds of ill health?	*Yes / <input checked="" type="radio"/> No / Not applicable - (if Yes please provide details below)
Have you been promised a specific or guaranteed rate of return on your pension under the new pension provider?	*Yes / <input checked="" type="radio"/> No (if Yes please provide details below)
Have you been informed of an investment opportunity in another country outside of the United Kingdom?	*Yes / <input checked="" type="radio"/> No (if Yes please provide details below)
Please provide details of any other information you believe is relevant to the above questions:	

Please return this form to us in the pre-addressed envelope provided along with any other documentation as explained in your pension transfer pack. If you do not return this form it may delay your pension transfer.

Phoenix Life
Lynch Wood Park
Lynch Wood
Peterborough
PE2 6FY



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