



Dear Sirs,

Scheme Name :
Scheme Policy No. :
My Name :
My NI Number :
My D.O.B. :

**Provision of Information under the Welfare Reform and Pensions Act 1999: -
The Pensions on Divorce etc. (Provision of Information) Regulations 2000**

I am considering a Pension Share of my pension under the current divorce regulations. I require information regarding all and any pension policies I might hold with you (even if not specified above) under the relevant Provision of Information Regulations. I also require other general information regarding my pension policies to enable me to fully understand my pension entitlements.

Accordingly, I would be grateful if you could supply the information listed below about all of my pension policies, namely:-

1. Please confirm the policy numbers of all pension policies I hold with you.
2. Please provide a Cash Equivalent Value (CEV) of my pension rights for divorce purposes for each of my pension policies. Please provide the values of any former Protected Rights. Please provide the effective date of the CEV calculation. If a current CEV cannot be provided free of charge then please provide a complete copy of the most recent CEV and all associated information relating to pensions on divorce.
3. Please provide a statement summarising the way in which the CEV is calculated together with the underlying financial and demographic assumptions used in the CEV basis.
4. Please provide details of the following pension benefits, which will be included in the CEV, and, if applicable, please provide figures for any Protected Rights and non-Protected Rights elements separately:
 - i. the date the pension commenced to be paid.
 - ii. the current amount of pension payable.
 - iii. confirmation of the amount of any tax-free cash sum that I took at retirement.
 - iv. the rate of increase applicable to the pension.
 - v. the frequency of pension payments.
 - vi. if there is any guarantee period applying to the pension.
 - vii. the current amount of any attaching spouse's pension.

5. Please advise if the annuity commenced from an open market annuity transfer option. If so, please provide details of the amount of the purchase price of the annuity, the date which the funds were received to purchase the annuity, the pension provider and the policy number from whom the annuity purchase funds were received.
6. If the annuity commenced from a policy formerly held with you, please provide details of the premium contribution history for that policy. Please include the amount and dates of all premium contributions paid into the former policy. Please provide the premium contribution breakdown in respect of both the former Protected Rights and the non-Protected Rights parts of the former policy if applicable.
7. If there was a transfer in to the policy formerly held with you, please provide details of the original pension scheme from which the transfer arose, the service dates within that scheme and the date and amount of the transfer in.
8. Please advise if the policies offer the internal or external transfer options when implementing a Pension Sharing Order. Please confirm if pension credit benefits could be transferred to a new pension policy with you or if they must be transferred elsewhere.
9. Please provide a schedule of charges which would be applied in the event that a Pension Sharing Order were received in respect of my pension policies. If no charges would be made for the implementation of a Pension Sharing Order, please confirm this.
10. If I have more than one pension policy, please confirm if each policy can be the subject of separate Pension Sharing Orders or is it the case that one Pension Sharing Order will be applied across all policies.
11. Please could you confirm whether the scheme will request information about my state of health if a Pension Sharing Order or provision were to be made and, if so, what information would be required concerning my state of health and what would the scheme do differently with regards to Pension Sharing.

Please note that I do not authorise you to incur any charges for the provision of the information unless these are explicitly explained to me in writing and I provide written acceptance of those charges.

I look forward to hearing from you at your earliest convenience and thank you in advance for your assistance in this matter.

In any case, I would be grateful if you could please advise me as to when I might expect to receive a reply to the above queries.

Yours faithfully,