



Dear Sirs,

Scheme Name :
Scheme Ref. 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 my pension under the relevant Provision of Information Regulations. I also require other general information regarding my pension to enable me to fully understand my entitlement in the scheme.

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

1. Please provide a Cash Equivalent Value (CEV) of my pension rights for divorce purposes. Please provide the values of any Protected Rights both pre and post 6 April 1997. 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.
2. Please provide the Normal Retirement Age and earliest date benefits can be taken from the scheme without consent or reduction.
3. Please provide details of any underlying defined benefit guarantees applying to my scheme benefits.
4. Please provide the maximum tax-free cash sum that I could take from my pension at my Normal Retirement Age based upon the CEV.
5. Please provide the date I joined the scheme and the current status of my membership, for example, active or deferred. If I am deferred member please provide the date of leaving the scheme.
6. Please provide details of any service breaks I have had or any part-time service I have had such as actual part-time hours worked compared to the full-time hours for a working week.

7. Please provide full details of all contributions paid into the pension. Please include the amount and dates of all employee and employer contributions paid into the pension.
8. If I paid any AVCs, please provide the following information:
 - i. the provider of the AVCs.
 - ii. the CEV of the AVCs.
 - iii. a full detailed history of the amounts and dates of AVC contributions paid.
9. If I transferred any benefits in to the scheme, please provide the following details in respect of that transfer:
 - i. the scheme from which the transfer was received.
 - ii. the service dates within the scheme from which the transfer was received.
 - iii. the benefits purchased in the scheme arising from the transfer in.
10. Please advise if the scheme offers the internal or external transfer options when implementing a Pension Sharing Order.
11. If the scheme offers the internal transfer option, please provide the following benefit details in respect of the pension credit benefit:
 - i. the pension credit retirement age.
 - ii. the earliest age at which pension credit benefits could be taken.
12. Please could you confirm how a Pension Sharing Order would be applied in respect of the main Defined Contribution benefits and any AVC benefits? Could you confirm that it is possible to have a Pension Sharing Order that referred only to the main Defined Contribution benefits such that the AVC benefits would not be Pension Shared? Alternatively is it the case that a Pension Sharing Order would apply in the same proportion to both the main Defined Contribution benefits and the AVC benefits?
13. Please provide a schedule of charges which would be applied in the event that a Pension Sharing Order or Attachment Order were received in respect of my pension.
14. Please advise if whether the scheme is winding up and, if so, the date upon which wind up commenced.
15. 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,