

## **PENSION SCHEME INFORMATION FORM**

*To be completed by the Pension Scheme Member/Policy Holder*

<b>Name</b>	
<b>Date of birth</b>	
<b>National Insurance number</b>	
<b>Current employer</b>	
<b>Number of pension schemes detailed on following pages</b>	

## Pension Scheme Information Sheet – defined benefit

<b>Name of scheme</b>	
Address	
Tel Number	
Website (if available)	
Member's ref no	
CETV quote attached	Yes/no
It is hoped that most of the pension details below will be shown on the CETV statement. If not, the following are needed:	
<b>Pension benefit details</b>	
Date of calculation	
CETV	
Is the CETV reduced for underfunding?	Please give details
Accrued/preserved pension	
Retirement age	
Death benefits pre-retirement	
Revaluation to retirement	
Death benefits post-retirement	
Pension increases in payment	
Early retirement terms	
Late retirement terms	
Please indicate if part of the pension has a different basis	
<b>Pension Sharing Order basis</b>	
Internal credit or external TV	Internal/external
Method of calculation	Please provide details
Scale of charges	Please provide details

