



GROUP PERSONAL PENSION PLAN

Personal details and declaration confirmation statement

We want to make sure your personal details provided to us by your employer are still correct.

We also need to make declarations to HM Revenue & Customs (HMRC) on your behalf, so that we can reclaim basic rate tax relief from them on any contributions you make to your employer's Royal London workplace pension scheme. The tax relief is added to your plan to boost your retirement savings.

Please check your personal details below and carefully read the declarations that we are making on your behalf on page 2 of this **personal details and declaration confirmation statement**. **If your personal details are correct and you agree with the declarations we're making you don't need to get in touch, but you should keep the information safe for future reference.** If any of your personal details aren't correct, or you believe for any reason you are not entitled to receive basic rate tax relief at source on your pension contributions, or if you don't agree with any of the declarations that we're making on your behalf, please tell us by using the **change instruction form** enclosed in this pack. Alternatively, you can provide us with details of any changes to your personal details online at www.royallondon.com/AEchangedetails

It's important that you let us know within 30 days of the date of the letter sent to you that includes this personal details and declaration confirmation statement and the change instruction form. If you do tell us of any changes we will send you a replacement personal details and declaration confirmation statement which reflects your changes.

Your details

Title	<input type="text"/>
First name(s)	<input type="text"/>
Last name	<input type="text"/>
Date of birth*	<input type="text"/>
National Insurance number*	<input type="text"/>
Permanent residential address	<input type="text"/>
Postcode	<input type="text"/>

Employment and scheme details

Name of your employer	<input type="text"/>
Scheme name	<input type="text"/>
Scheme number	<input type="text"/>
Employment status	<input type="text" value="Employed"/>

* If your national insurance number or date of birth isn't correct, or showing as 'Not known', please tell us your correct details by completing the **change instruction form** enclosed in this pack. We need this information so that we can continue to accept contributions from you into your plan. If you don't have a national insurance number please let us know why.

Your personal information will be used to administer your plan.

To understand the detail of how we use your information, visit royallondon.com/privacynotice or call us on **0800 085 8352**.

Declaration made on DD/Month/year by Royal London on your behalf

- Your personal details provided on page 1 of this **Personal details and declaration confirmation statement** are complete and accurate.
- Your total pension contributions in any tax year to all registered pension schemes won't be more than 100% of your relevant UK earnings for the relevant tax year or £3,600 if greater.
- You are entitled to tax relief on your contributions because you're under the age of 75 and one or more of the following applies:
 - you either are or have been a resident in the UK in the current tax year, or
 - you have relevant UK earnings, or
 - you're a crown servant or a husband, wife or civil partner of a crown servant.
- If an event occurs which results in you no longer being entitled to tax relief on your contributions, for example you cease to have any relevant UK earnings, you will tell Royal London by the later of:
 - 5 April in the year you are no longer entitled to tax relief
 - 30 days after the date you are no longer entitled to tax relief.

It's a serious offence to make false statements in order to obtain tax relief on contributions. The penalties are severe and could lead to prosecution.



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royallondon.com

We're happy to provide your documents in a different format, such as Braille,
large print or audio, just ask us when you get in touch.
All of our printed products are produced on stock which is from FSC® certified forests.

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