

MC Trustees Private Pension

Contributions Form

Membership Number:

For Office Use Only

| | |
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| 1: Personal Details | |
| Title: (Mr/Mrs/Miss/Other) | <input type="text"/> |
| Surname | <input type="text"/> |
| Forename/s (in full) | <input type="text"/> |
| Date of Birth | <input type="text"/> |
| 2: Contribution Details | |
| a) Personal contributions (net of basic rate tax) | £ Monthly/Quarterly/Annually/Single |
| b) Please advise us of the source of your personal contribution(s) by ticking one or more of the options | Employment Income |
| | Savings/Investment |
| | Sale of Property |
| | Inheritance |
| | Divorce Settlement |
| | Other (please specify) |
| c) If your Employer is to pay contributions into your MC Trustees Private Pension, please provide details of your Employer's name, address and post code and company number (where applicable) | <input type="text"/> |
| d) Employer Contribution (gross): | £ Monthly/Quarterly/Annually/Single If your Employer intends to use a standing order to make regular contributions, we must receive the first payment by means of a cheque drawn on an account in the Employer's name held by a UK bank or building society. Any single contributions must be paid by the same method. |
| e) Intended retirement age (this can be altered at any time) | <input type="text"/> |
| f) Exact nature of occupation | <input type="text"/> |
| g) Estimate of earnings/profits in current tax year | <input type="text"/> |

Note:

There is no limit on the contributions you can make but the tax relief granted by HMRC only applies up to the 'Annual Allowance' which is £50,000.00 for the 2011/12 tax year. If you do make a contribution which exceeds the 'Annual Allowance' tax charges may be applied.

Applicants Initials

MC Trustees Private Pension

Contributions may be made by you or another person on your behalf (ie. your spouse, parent or grandparent) or by your employer.

Personal contributions are made net of basic rate tax. Employer contributions are made gross.

All contributions will be allocated to the non Protected Rights part of your MC Trustees Private Pension. You may not make contributions to Protected Rights funds.

Please refer to the Key Features Document for additional information on making contributions if you are a non-UK resident.

Important Statement

- **It is an HMRC requirement to remind you that it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.**

General declaration and agreement

I declare that:

- (a) to the best of my knowledge and belief the information contained in this Application is true and complete and that this declaration and any other declaration made in connection with this Application shall be the basis of the contract(s) with MC Trustees (Pensions) Limited.
- (b) the total contributions to any registered pension scheme in respect of which I am entitled to receive tax relief, will not exceed the higher of the basic amount (£3,600) or my relevant UK earnings.
- (c) I will advise MC Trustees (Pensions) Limited if an event occurs, for example I cease to have any relevant UK earnings (and as a result I am no longer entitled to tax relief for an earlier contribution) by the later of 5 April in the year of assessment in which the event occurs and 30 days after the event occurred.
- (d) I understand that MC Trustees (Pensions) Limited is authorised by the Financial Services Authority to establish, operate and wind up personal pension schemes but is not authorised to give financial or investment advice.

I hereby:

agree to be bound by the governing Deed and Rules of The MC Trustees Private Pension

I confirm that, to the best of my knowledge and belief, the details given on this Application Form are correct and complete.

SIGNED

DATE

Notes: 1 Only Applications that have been signed and dated can be processed.

2 All questions must be answered

3 The completed Application should then be returned to:-

MC Trustees (Pensions) Limited
Enterprise House
Meadow Drive
Hampton in Arden
West Midlands B92 0BD

Tel 01675 444600
Fax 01675 444601
Email mail@mctrustees.co.uk