

Executive Pension Date Alteration



Section A - Personal Details

Scheme Name	<input type="text"/>	
Scheme Number	<input type="text"/>	
Member Name	<input type="text"/>	
Current Address	<input type="text"/>	
	<input type="text"/>	
Phone Number	<input type="text"/>	Email <input type="text"/>

Section B - Alteration Details

Revised Pension Age

Premium Payments to continue Yes No

Notes

- 1 Any outstanding premiums must be paid in advance of the alteration.
- 2 Please note the original payment frequency will apply.
- 3 For traditional With Profit Policies only
 - (A) We will provide Guaranteed Annuity Rates that apply to the new retirement age, up to age 70. After age 70, the rate will be the higher of the guaranteed rate at age 70 or our open market rate.
 - (B) The Guaranteed Benefit and the annual bonuses will be amended to reflect the new term of the policy. Following the change in pension date, the amount of terminal bonus that may be payable at the revised pension age will be dependent on the rates applicable at that time.
 - (C) If you decide to increase your retirement age, you will not be entitled to your Guaranteed Benefit and annual bonuses until your revised date of retirement. If you decide to cancel your policy before your new retirement age, you will be entitled to your surrender value only, which will not be guaranteed and may be less or greater than previously quoted.
 - (D) If you decide to reduce your retirement age, your Guaranteed Benefits and annual bonuses may reduce.

Section C - Declaration

We recommend that you speak with your Financial Broker before deciding to alter the pension date on your policy.

Signature of Trustee Date

Please complete this form and return it to Individual Existing Pension Services at Aviva Life & Pensions Ireland Limited, One Park Place, Hatch Street, Dublin 2.

Please contact us on 1890 64 64 64 or csc@aviva.com if you have any questions. We're happy to help you.