

Personal Pension -

Isle of Man contracts only

Supplementary application



You can use this form to:

Increase regular payments

Start a new regular payment for the first time

Restart regular payments

Pay a single payment

Please tick to show us what you want to do

If you have any questions, please call us:

Individual Pension planholder no: **0800 068 6800**

Group Personal Pension

helpdesk no: **0800 145 5744**

Please return your completed application form to:

Aviva, PO Box 520, Norwich, NR1 3WG

If any information is missing it will delay your application.

To Transfer benefits from another Aviva pension and/or Transfer benefits from another pension provider, you will need to complete a separate transfers form that will be provided on request from us.

Important information

Please ensure that the information you give us on this form is correct. If any of the information you give us is not true or not complete and this might reasonably affect our decision to provide you with this policy then we may refuse your application, change the terms of this policy, restrict the benefits payable under this policy, or cancel this policy and refund the payments paid less our reasonable expenses.

Your details

Your Aviva plan number

Title

Mr/Mrs/Miss/Ms/Dr/Other

Surname

Forename(s)

Date of birth*

D	D	M	M	Y	Y	Y	Y
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* If the plan holder is aged below 18, their legal guardian must complete this form, and both the planholder and the legal guardian declarations.

National Insurance Number (NINO)

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Your permanent residential address

This means the address where you currently live

House name (if applicable)

House number

Street name

Town

County

Postcode

Country

Contact details

Telephone number

Mobile number

Your preferred contact number (between 9:00 am & 5:00 pm)

Your email address

Please let us know if you've changed your address recently by calling us.

Your details continued

Which of the statements in a. and b. describe your current status? Please complete both a. and b.

a. Tick **one** box only

I am

Employed*

Self-employed*

Unemployed

Other*

*Please state your occupation

b. Tick **one** box only

I live permanently in the Isle of Man

I do not live in the Isle of Man*

*If you do not live in the Isle of Man, no further contributions can be paid into this plan. Please contact us to tell us when you left the Isle of Man.

Your payments (Adding, restarting or increasing regular payments or making a single payment)

Your total regular payment £ gross

Paid monthly annually

Starting from month year

If you're adding payments for the first time, please choose a collection day between the 1st and 28th:

You will also need to complete the direct debit at the back of this form.

If your regular payments are being collected from your employer's bank account, the start date and frequency you give us will be overridden by their instruction.

Your single payment £ gross

How to make single payments

By bank transfer

You can make a payment direct to our bank account using these details:

Account number - 61224662

Sort code - 40-02-50

Reference - Your plan number.

Please let us know if you have made a payment this way. It may take three to five working days for your money to transfer.

I've made a payment to the above account Yes No Paid on

By cheque

You can also pay by cheque. Please make your cheque payable to Aviva Plc and enclose it with your application form, quoting your policy number on the back of the cheque. If you wish to pay with a Building Society or Bankers Draft, the society or Bank must endorse the cheque with the full name of the person from whose account the funds are drawn.

Indexation (automatic increases to regular premiums)

Some plans give you the option to automatically increase your regular payments on the plan anniversary. If you would like to know more about this, please call us.

Integrated waiver of premium and life cover

Any restarted premiums will exclude waiver of premium and integrated life cover. If you previously had these benefits and would like to restart them please call us.

Your employer's payments and deductions (Adding, restarting or increasing regular payments or making a single payment)

Your employer must complete this section.

Company name

Address

 Postcode

Company registration number

Contact name

Telephone number

Email address

Your employee's payment

Will you be deducting the employee's payment from their pay? Yes No

Please confirm the date you will (or did) take the first deduction.

If this is in the calendar month before the first employer regular payment date, the payment due date must not be later than the 19th.

We need this information to help us monitor payments made or passed on by you. This is a requirement of the Isle of Man Financial Services Authority.

Employer's total regular payment

£ gross

Paid monthly annually

Starting from month year

You will also need to complete the direct debit at the back of this form.

If you're adding payments for the first time, please choose a collection day between the 1st and 28th:

Employer's single payment £

Please refer to how to make single payments on page one.

Investment choice

We'll invest your payments in the funds and proportions you've already chosen unless you tell us differently in the table below. We recommend you talk to a financial adviser before choosing which funds to invest in. For details of the funds available to your plan, please visit our Fund Centre at aviva.co.uk/retirement/fund-centre/pension-funds.html or contact us. If you want to make a specific fund choice for this request, we MUST have this information before the supplementary application form is submitted.

Existing regular premiums

If you're already making regular payments, we'll invest your money in the same funds. If you want to change your fund choice please call us.

Please enter whole percentages only. The percentages must add up to 100% for each investment.

Fund name	Single payments %	Regular payments % <small>(only complete if adding regular payments for the first time)</small>
Example: Aviva Deposit	100%	
	100%	100%

Nominated beneficiary

If you die before you have taken all your benefits from this plan, we can pay them to someone else. You can tell us at anytime who you would like us to pay if you die. This won't be legally binding on us, but we'll take your nomination into account when we decide who should receive any lump sum payment on your death.

You should make sure that you regularly review any nominations you've made, especially if your personal circumstances change. Please refer to your plan terms and conditions for further information about nominated beneficiaries.

Changing your nominated beneficiary

If you want to make a new nomination or change an existing nomination, you will need to let us know in writing. Alternatively, you can complete an expression of wish form. Please call us if you would like us to send you a form or would like more information.

Declaration

Please ensure that the information you give us on this form is correct. If any of the information you give us is not true or not complete and this might reasonably affect our decision to provide you with this policy then we may refuse your application, change the terms of this policy, restrict the benefits payable under this policy, or cancel this policy and refund the payments paid less our reasonable expenses.

Please read the following carefully before signing and dating this application.

Planholder's Declaration

- To the best of my knowledge and belief, the information on this application, including any additional sections and any information not provided by me is correct and complete, and has been included with my agreement.
- I receive income and my employment status has not changed since I last certified to Aviva.
- The total contributions payable under this plan together with any other contributions to personal pension arrangements, retirement annuity contracts or retirement annuity trusts do not exceed the maximum permitted by the Assessor of Income Tax.
- Relevant earnings in respect of which payments have or will be made, are not in respect of any employment as a Controlling Director of an Investment Company.

Employer contributions

If applicable, I have authorised my employer to deduct my payments from my earnings. I want my employer to inform Aviva of any changes to my payments. Aviva should accept these instructions as if they had come from me.

- I agree Aviva will use the information I give (as well as information about me relating to any existing plan I have with Aviva) for administration, underwriting, claims, research and statistical purposes. I agree Aviva may pass information to reinsurers and any agency appointed by Aviva for these purposes. (These agencies may be located in countries outside the UK that do not have laws to protect your information. Details of the companies and countries involved in your case will be provided on request. Aviva will remain responsible for making sure the information is held securely.)

If my details change

I will inform Aviva if:

- I stop living in the Isle of Man, or
- I stop receiving relevant Isle of Man earnings.

I will advise Aviva within 30 days, or by the end of the tax year in which the event occurs if later.

Data Privacy

To learn about how Aviva processes Personal Information, please see our privacy policy at aviva.co.uk/privacypolicy. It's updated from time to time to take account of changes in our business activities, legal requirements and to make sure it's as transparent as possible, so please check back in to see the latest version. A paper copy can be provided on request by writing to: Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR

Financial Crime

To verify your identity and prevent financial crime, your information may be used by any company within the Aviva group. It may also be shared with third parties who provide services to us, and to any other organisations, where required to by law and regulatory requirements.

We may record any searches carried out. These, and any suspicion of financial crime, may be used to help other companies with verification and identification. The search isn't a credit check and your credit rating shouldn't be affected.

Planholder's signature

If the planholder is a minor this must be signed by the legal guardian.

Signed:

Date:

D	D	M	M	Y	Y	Y	Y
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Employer Declaration

To be signed by the employer contributing to this plan and/or forwarding member payments to this plan (if applicable)

- I/we understand that the planholder (the member) is currently living in the Isle of Man.
- I/we understand that as the employer I/we have no rights to any benefits which are payable under the terms of this policy and the Rules (which may be amended from time to time).
- I/we declare that employer's payments, if any, in respect of the member will be paid until further notice.
- I/we declare that the member's payment will be deducted from the member's gross earnings and will be forwarded promptly to Aviva on each payment date. Where applicable, suitable authorisation from the member has been obtained.
- The payment date will be no later than 19 days from the end of the calendar month in which the deduction was made.

- I/we declare that this agreement shall cease to operate in respect of the member, if they leave our employment or on such earlier date as agreed with them. In either case, Aviva shall be notified accordingly.

Employer Name

Employer representative

Name

Job title

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Legal guardian Declaration

- I declare that I am legal guardian of the planholder (the member), and I have read, agree with, and signed the declarations.
- I understand I am responsible for this plan as if I were the member until the member reaches age 18.
- I understand that all payments to this plan may only be returned to the member in the form of benefits payable under the rules of the Scheme.

- I understand that in relation to the prevention of money laundering you may complete an electronic search or require me to provide additional evidence as outlined in the member's declaration.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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INSTRUCTION TO YOUR BANK OR BUILDING SOCIETY
TO PAY BY DIRECT DEBIT



Aviva Life & Pensions UK Limited,
Wellington Row, York, YO90 1WR

Please fill in the whole form using a ball point pen and send it to: Aviva Life & Pensions UK Limited, PO Box 520, Norwich, NR1 3WG.

Name and full postal address of your Bank or Building society

To The Manager	Bank/Building Society
Address	
Postcode	

Service user number

4	0	9	6	6	2
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Instruction to your Bank or Building Society

Please pay Aviva Life & Pensions UK Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Aviva Life & Pensions UK Limited and, if so, details will be passed electronically to my Bank/Building Society.

Name(s) of Account Holder(s)

Signature(s)

Bank/Building Society account number

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Branch Sort code

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Date

Reference

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Banks and Building Societies may not accept Direct Debit Instructions for some types of account.

This is not part of the Instruction to your Bank or Building Society and must be detached by Aviva Life & Pensions UK Limited before submission to the Paying Bank.

Account holders address	Address
Preferred payment day (Between 1st and 28th)	Postcode

This guarantee should be detached and retained by the payer.

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Aviva Life & Pensions UK Limited will notify you five working days in advance of your account being debited or as otherwise agreed. If you request Aviva Life & Pensions UK Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Aviva Life & Pensions UK Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
 - If you receive a refund you are not entitled to, you must pay it back when Aviva Life & Pensions UK Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.



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| Retirement | Investments | Insurance | Health |

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[aviva.co.uk](https://www.aviva.co.uk)

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