

Member's Questionnaire For A Defined Benefit Scheme

Scheme Name _____

Please confirm the following information (which will be held in the strictest confidence):

Which of the following best represents your views about your former employer

I do not want my pension benefits to be tied to my former employer for personal reasons	
I have no objection to leaving my pension but I am concerned about the scheme's financial position	
I have no objection to leaving my pension but I am concerned about the employer's financial position	
Although I feel my pension is very secure I would prefer to have control of the fund	
Although I feel my pension is very secure I would like to improve the value of the benefits	
I feel my pension is secure and do not want to control the fund or improve the benefits	

Which of the following best represents your view about death benefits

Death benefits are not an important consideration for me	
Death benefits are less important to me than improving my own retirement benefits	
Providing the maximum pension for my spouse is my main requirement	
Providing the maximum lump sum for my family is my main requirement	
I have dependant children and providing a pension for them is my main requirement	

Which of the following best represents your views about the way your pension is paid to you

I am happy with a pre-determined pension income that is secure even if I have no control over it	
While a pre-determined pension income is acceptable it is not essential to me	
I would prefer to have the flexibility to control the level of pension income from year to year	
Flexibility is essential for me as I will have financial needs which will be variable	

Which of the following best represents your views about lump sum benefits at retirement

I need to take the maximum possible lump sum for another purpose	
Although I would like to have the maximum lump sum it is not an essential requirement	
I am not particularly concerned about a lump sum and would prefer a higher pension	
I am not particularly concerned about a lump sum and would be happy to take it in instalments	

Which of the following best represents your views about the timing of your benefits

I need to start my pension benefits as soon as possible	
I need to take my lump sum as soon as possible	
I want to retire earlier than the scheme pension age and am happy with a reduced pension	
I am not likely to retire for some time and want to defer my pension as long as possible	
I have no particular views at this stage	
I am happy to start taking my benefits at the scheme normal retirement age	

Which of the following best represents your views about the security of your pension

I will depend heavily on this pension in retirement and cannot afford to take any risk with it	
Although this pension is important I am happy with a modest risk if my benefits could be improved	
Although this pension is important I want to improve the benefits and accept that there is a risk	
This pension is only a modest part of my retirement income and security is not a major concern	
I have many years to go before I will need the pension and want to control the investment until then	

Signed _____

Date _____

Client _____

Authority To Scheme Trustees/Administrators

Scheme Name _____

Address of Scheme _____

Membership Number or N.I. Number _____ Date of leaving service _____

Dear Sirs,

I authorise you to provide information to Intelligent Pensions Ltd .

Yours faithfully,

Date _____