

Additional contribution lump sum payment form

For active members of the TSB Pension Scheme

Action point

Complete this form if you would like to make additional contributions in the form of a lump sum payment. Once you have completed the sections relevant to you in BLOCK CAPITALS and black ink, please sign, date and return to:

Equiniti Limited,
PO Box 4945
Aspect House
Spencer Road
Lancing
BN99 8LQ

If you have any questions please contact Equiniti:

0345 266 9214

tsbpensions@equiniti.com

Consider this

You'll need to claim the tax relief you're due through your tax return, or by contacting HM Revenue & Customs (HMRC).

Section A - Your details

Full name (in capitals):

Branch/Department:

TSB Payroll ID*:

* This is a mandatory field. For help in finding this ID, please refer to your payslip.

Section B - Your additional contribution

I would like to make an additional contribution lump sum payment of:

Please find enclosed my cheque for the above amount, made payable to the TSB Pension Scheme.

Alternatively, if you'd like to make a bank transfer payment please contact Equiniti at the details above.

Section C - Your authorisation

I am aware that the Annual Allowance (AA) is the total amount that can be paid into my pension scheme(s) in a tax year without giving rise to a tax charge. The AA is £40,000 for the foreseeable future and I understand that it is my responsibility to ensure that the total of any pension scheme contributions I make do not exceed the current AA. If I exceed the AA for the current tax year, I am aware that I will be required to declare this in my self-assessment tax return.

Data Protection

The Trustee of the Scheme is a data controller in respect of personal data processing for the administration of the Scheme.

As data controller, the Trustee holds and processes certain personal data about you, as a Scheme member, and possibly those of your dependants and beneficiaries. Personal data means information that can be used to identify you, such as your name. The Trustee holds and processes this data to properly administer the Scheme and to comply with the law.

The types of data the Trustee may collect and hold will include, for example, your National Insurance number, date of birth and your postal address. The Trustee generally collects this data from you and from TSB. Some of the data the Trustee collects may be classed as 'sensitive data', such as information you tell us about your health when applying for ill-health pension benefits. The Trustee may require your consent to collect and hold this data.

As the Trustee is assisted by third parties to properly administer the scheme, your personal data may be shared with these parties, including for example, the Scheme's administrator, the Trustee's professional advisers (such as the Scheme's lawyers), service providers, regulators and Government bodies. Your personal data may also be shared with TSB.

Further information on how the Trustee uses your personal data and your rights regarding that data can be found at www.tsbpensionscheme.co.uk/pensions_talk. If you have any questions you can call Equiniti on 0345 266 9214 or email tsbpensions@equiniti.com.

Signed:

Date: