

Third party payment form

Important Information

Please complete this form to make payments on behalf of a WS Stakeholder Pension Scheme member.

Please complete all the appropriate sections in BLACK ink and CAPITAL LETTERS.

1. PLAN HOLDER DETAILS

Plan number

Mr/Mrs/Miss/Ms/Other

Surname

Forename(s)

2. YOUR DETAILS (AS THE PAYER)

Mr/Mrs/Miss/Ms/Other

Surname

Forename(s)

Address

Postcode

Telephone number

Email address (optional)

Date of Birth

Relationship to the Plan member

Confirming your identity

To protect you and us from financial crime, we may need to confirm your identity from time to time. Please refer to our Verification list, available on our website pensions.fundsolutions.net, which details the forms of documentation we require, and who can certify your documentation.

3. PAYMENT DETAILS

Please provide details of the contributions you wish to make (the minimum contribution is £20 gross).

I wish to make a single contribution of Net (see [notes 1 and 3](#))

I wish to make a regular contribution of Net (please complete the Direct Debit instruction if applicable) (see [notes 2 and 3](#))

Do you want your regular contribution indexed? Yes No

If 'Yes', please state the percentage you wish your payments to be indexed by %

This must be a whole number between 3% and 10% (inclusive). Additional information is contained in the Terms and Conditions of the WS Stakeholder Pension Scheme under section 3 of the Plan Conditions.

Note 1

The net amount is the amount you want to pay. Your contract is for the gross contribution, which is the amount stated plus basic rate tax relief (at the rate that applies to you when you pay this contribution).

Note 2

The net amount is the amount you want to pay. Your contract is for the gross contribution, which is the amount stated plus basic rate tax relief (at the rate that applies to you when you pay this contribution). If basic rate tax relief changes at any time, the net amount you pay by Direct Debit will change. If you pay by cheque, you will need to amend the level of payments you make. If you do not change the level of your net contribution, the gross contribution will change affecting the projected benefits.

Note 3

Cheques must be made payable to Waystone Management (UK) Limited SHP with the Member's name on the payee line; for example: 'Waystone Management (UK) Limited SHP – J. Smith'.

Alternatively, if you have access to online banking, send your single contribution direct to our bank:

Bank

Bank sort code

Bank account number

Important note: Please quote the Plan holder's name and Plan number as the payment reference.

4. DECLARATION BY PAYER

- I understand that you may decline my payment(s) for any reason.
- I confirm that payments are being made on behalf of the member and the member (or their legal guardian) is aware these payments are being made.
- I understand that payments will be treated as if made by the member.
- You will hold my data for the purposes of facilitating my payment(s) and not use it for any other purpose.
- I agree to be bound by the Plan Conditions (which can be found in the Key Features and Terms and Conditions of the WS Stakeholder Pension Scheme).

Print full name (in BLOCK CAPITALS)

Signature

Date

5. INVESTMENT DETAILS AND MEMBER DECLARATION

Please select the fund(s) in which you would like this transfer to be invested by completed the table below. If you do not make an investment choice, your transfer will be invested as per the instructions we hold for you.

Fund	% Investment Split	
	Single contributions	Regular contributions
WS Global Multi Index Pension Fund	%	%
WS UK Gilt Index Pension Fund	%	%
WS Global Development Index Pension Fund	%	%
WS Cash Pension Fund	%	%
WS Sterling Corporate Bond Index Pension Fund	%	%
WS Global Emerging Markets	%	%
Total	100%	100%

Or

I wish contributions to be invested in the following Lifestyle Profile

Profile 1 Profile 2 Profile 3

During the five years before your Selected Retirement Date, the pension fund will gradually be switched into the WS Cash Pension Fund. This is known as the Security Option. For more information, please see Section 8 of the Plan Conditions, which can be found in the Key Features and Terms and Conditions of the WS Stakeholder Pension Scheme.

If you would like to opt out of the Security Option, please tick here

Signature of member

Date

Once completed the form should be returned to:

Waystone Management (UK) Limited
 PO Box 5246
 Aspect House
 63 Spencer Road
 Lancing
 BN99 9GP



Instruction to your bank or building society to pay by Direct Debit

Please fill in the whole form using a ball point pen and send it to:

Waystone Management (UK) Limited
PO Box 5246
Aspect House
63 Spencer Road
Lancing
BN99 9GP

Service user number:

9 4 8 1 2 4

Name(s) of account holder(s)

Reference

Instruction to your bank or building society

Bank/building society account number

Please pay Waystone Management (UK) Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee.

Branch sort code

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I understand that this instruction may remain with Waystone Management (UK) Limited and, if so, details will be passed electronically to my bank/building society.

Name and full postal address of your bank or building society

To: The Manager Bank/building society

Signature(s)

Address

Postcode

Date

Banks and building societies may not accept Direct Debit instructions for some types of account

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, Waystone Management (UK) Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Waystone Management (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 Waystone Management (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 Waystone Management (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.

