

Small Pot Discharge Form

Please complete the following form to confirm that you'd like to exchange your pension benefits for a Lump Sum from the Plan

Please include with this form:

- The original of your birth certificate or passport (current or expired). Please note that all original certificates are returned via the same method they are received; or
- A photocopy of your birth certificate or passport (current or expired) provided that it is certified as being a true copy of the original by one of the following:
 - An individual who is a member of a professional body (e.g. an actuary, solicitor or accountant)
 - A bank or building society employee
 - A Government employee (e.g. Head Teacher, Members of the Police Service)
 - An FCA 'Approved Person' such as a Head of Compliance, financial adviser, etc.
 - Individuals in positions of trust (e.g. GP, Justice of the Peace, Magistrate, School Governor, etc.

To the Trustees of The Hewlett-Packard Ltd Retirement Benefits Plan (the Plan)

Your Name:

Date of birth:

Your Member Number:

I have considered all of my options, taken independent financial advice where appropriate, and would like to request the Trustees of the Plan to fully convert my Plan benefits and any pension benefits that may be payable to my spouse in the future into a Lump Sum and to pay this amount to me. I understand that in giving these instructions, I cannot later change my mind. I understand that 25% of the sum will be free of UK tax and that the remainder will be taxed at my Basic Rate.

In consideration of the payment to be made to me, I discharge the Trustees of the Plan of all liability in respect my benefits held under the Plan.

Please pay the lump sum directly into my bank account, the details of which are:

Name of bank: _____

Bank address: _____

Bank Account No

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Sort Code

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Signature: _____ Date: _____