




LLOYDS BANKING GROUP
PENSIONS TRUSTEES LIMITED

Authority to Transfer Form


for members of Your Tomorrow (the Scheme)

Complete this form if you wish to explore the possibility of transferring benefits from a previous pension arrangement. Once you've completed the sections relevant to you in BLOCK CAPITALS and black ink, please sign, date and return to:

 Lloyds Pension Administration
WTW

PO Box 545
Redhill, Surrey RH1 1YX

If you've any questions or require this document in large print, Braille or audio format, please contact the Scheme administrator:

 01737 227 522

@ yourtomorrow@wtwco.com

Section A - Your details

Title (e.g. Mr, Mrs, Dr): Mr

Telephone number: 07808217133

Forename(s): Joseph Ross

Email address: joewilliams9799@gmail.com

Surname: Williams

Date of birth: 09/07/1999

Current address: Basement Flat, 12 Pembroke Road, Bristol, BS8 3AX

Payroll ID or National Insurance No*: PE74845ID

*This is a mandatory field.

Section B overleaf...

Section B - Your previous arrangement(s)

I'm interested in investigating a transfer from my previous arrangement and authorise the Scheme administrator to obtain any information they may require.

Full name and address of previous pension provider(s):

Legal & General
Workplace DC Pensions
10 Fitzalan Place
Cardiff
CF24 0TL

+

Reference/Policy number(s) under previous pension arrangements:

2515946501

Please confirm any previous addresses:

6 Avon Crescent
Bristol
BS1 6XQ

222a Mile End Road
London
E1 4LJ

Please provide the latest piece of correspondence you've received from your previous pension provider.

Note, your previous pension arrangement may request evidence of your employment with the Group. If required, instructions on how to obtain evidence can be found at lloydsbankinggrouppensions.com/scheme_benefits/tran_in

Section C - Looking after your data

The Trustee is a 'data controller' of personal data it processes to administer 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, to comply with the law and to ensure you receive your Scheme benefits.

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 your employer. Some of the data the Trustee collects may be classed as 'special category data', such as information you tell us about your health if you apply for ill-health pension benefits. Where the Trustee collects such data, we are required to meet additional legal requirements in relation to our processing activities. 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 Scheme's actuary, 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 your employer and the trustees of any other Lloyds Banking Group pension scheme, life assurance scheme or death benefit scheme under which you are a beneficiary or member, or any third parties providing services connected to the administration of those schemes.

Further information on how the Trustee uses your personal data and your rights regarding that data can be found at lloydsbankinggrouppensions.com/data

Section D - Your authorisation

I wish to explore the possibility of transferring benefits from a previous pension arrangement.

Signed:



Date: 15/01/2025