Guidance notes for advisers

Your client's Guaranteed Pension Annuity application

Thank you for choosing Hodge Lifetime for your client's pension annuity. The following guidance notes provide details of the documents required from you and your client in relation to a new business application.

Document	What to do with each part
Guidance notes for advisers	For your information, to assist with your client's application.
Guidance notes for applicants	Please forward to your client.
Open market option quotation	Check for accuracy and forward to you client.
Application form	To be forwarded to your client for completion and returned to you for checking. Once you are satisfied that the application is complete, please sign and date the adviser section.
Discharge authority form(s)	Forward to your client. One form is required for each fund that forms part of the application. Your client should return each form to you with their completed application.
Cancellation notice	Forward to your client for them to keep and use if they wish to change their minds.
Verification of identity form(s)	Please complete a form for your client and any named dependant.
Key features	Forward to your client for them to keep.
Policy terms and conditions	Forward to your client for them to keep.

Please note that the above mentioned documents are available for download via The Exchange and hodgelifetime.com or by contacting Hodge Lifetime on 0800 731 4076.

On receipt of completed paperwork from your client, please make certified copies of age admission documentation (birth certificates, marriage certificates etc) and return the originals to your client.

Please send your completed application pack, and certified copies of supporting documents to:

Hodge Lifetime, Annuity Administration Centre, Sutherland House, Russell Way, Crawley, West Sussex RH10 1UH

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