

ANNUITY TRANSACTION STATEMENT

I hereby instruct Chartwell to proceed on my behalf with obtaining the most competitive annuity rates given my individual circumstances.

I understand that the quotations/illustrations will be obtained based purely on 'best rates available' and from the information I have provided. I confirm I am basing my selection and any subsequent purchase on the generic and general information (and product particulars and Key Features documents) provided to me and understand that Chartwell have not commented on the suitability of the annuity for my personal situation. I therefore accept full responsibility for choosing it and understand that Chartwell would not accept any liability if it was later discovered to be in appropriate.

I have received a copy of Chartwell's Terms and Conditions of Business.

I confirm my agreement to Chartwell receiving commission from the annuity provider as detailed in the illustrations provided by the leading annuity providers.

I confirm that this agreement and transaction relates only to the setting up of an annuity. Chartwell are not responsible, nor have we taken into account, any other part of my portfolio.

If you feel at all unhappy with conducting business on this basis and would like to receive personal advice from us then please contact us. We will be happy to refer you to one of our Independent Financial Advisers at Chartwell Private Client Limited.

Signature

Name in BLOCK CAPITALS

Date

Chartwell Annuity Centre is a trading style of Chartwell Private Client Limited.
Registered Office: Minerva House Lower Bristol Road, Bath BA2 9ER.
Registered in England No. 5464443

Chartwell Private Client Limited is authorised and regulated by the Financial Services Authority.