

Pension Protection Fund Change of Position Questionnaire



Please complete the questions below with as much detail as possible.

Some of the questions may not be relevant, or you may not know the answer, so please mark these with "not applicable" or "not known".

Please continue onto a separate page if there isn't enough space for your response to any of the questions.

1. Can you give us some more information about what you were told by the Scheme about the payments you received? Please provide as much information as you can.

2. Do you have any letters from the Trustees or Administrators explaining the amount of your payment? If yes, please send what you have.

3. Did you question the amount of your entitlement at the beginning, or at any other time, whilst payments were being made to you? If so, please provide as much information as you can, e.g. when (approximately) you questioned this and who did you question this with?

4. Did you make any decisions in reliance on what you were told your scheme pension or scheme lump sum would be? Please give details e.g. explain what the decision was, give the date(s), details of costs incurred, why you made the decision

5. Did you incur any particular expenses in reliance on what you were told your scheme pension or scheme lump sum would be? Please give details about the expense(s), the date(s), the amount or value, why you incurred the expense etc. Note that we'll consider all types of expenses, both big and small.

6. Did you make any lifestyle improvements in reliance on what you were told your scheme pension or scheme lump sum would be? Please give details of the lifestyle improvements, the date(s), costs, why you made the lifestyle improvement etc. Note that we'll consider all types of lifestyle improvements, both big and small.

7. Can you explain how your decision/expenditure referred to above was made in reliance on the scheme pension or scheme lump sum you expected to continue to receive? In other words how would you have acted differently if you'd known that your scheme payment(s) should have been lower?

8. Can you confirm whether any of the following applies to your answers for the questions above:

a. You would have made the decision/incurred the expenditure even if you'd received a lower scheme pension or scheme lump sum?

'YES' or 'NO'?

If your answer is "NO" please give details to explain your answer.

b. The only reason you made the purchases/incurred the expenditure was because you thought that the scheme pension or scheme lump sum was paid at the correct amount so it was yours to spend and that you didn't expect the amount to reduce, or have to be repaid?

'YES' or 'NO'?

If your answer is "YES" can you explain your answer and provide evidence of any statements from the Trustee/Administrators of the Scheme that you relied upon?

9. Did you save any of the lump sum or monthly payments you received from the scheme? If yes, how much? (£)

10. If you think that the Trustees/Administrators of the scheme might have been aware that the lump sum and/or pension they paid to you was higher than it should have been can you provide any information you may have. In particular we'd need to know the date on which the Trustees first became aware of the overpayment. If you have any letters or announcements from the Trustees/Administrators please send them to us.

If you wish to use post, please sign and date this questionnaire and return to the following address:

Pension Protection Fund, PO Box 254, Wymondham, NR18 8DN

Alternatively, you can send us scans of this form and documentary evidence via our 'Send us a document' facility which is available in the 'Communications' menu when logged in to the Pension Protection Fund member website.

I certify that the information I have provided is correct and complete to the best of my knowledge.

Signature:

Date:

Name:

Address:

Date of birth:

National Insurance number:

For more information on how we use your data, please visit:
www.ppfmembers.org.uk/en/PrivacyPolicy