SUP Ann 6R: Persistency Report

- REP003 Persistency Report –
 Nil Return Declaration
- Persistency Report –Life Policies
- 3. Persistency Report Stakeholder Pensions



REP003 - Persistency reporting

Nil R	eturn Declaration			Α
1	Do you wish to report a nil	return for life policies?		
258	Do you wish to report a nil	pensions?		
Life F	Policies	Α	В	С
Secti	on 1 – Regular Premium –	Y1		
		In force at outset	In force at anniversary	Persistency rate
		Co	ompany <i>Representa</i>	tives
2	Endowment Assurance		mpany kepresenta	
3	Whole Life Assurance			
4	Personal Pension Policy			
5	Other Pension Policy			
6	Other Life Assurance			
7	Income Withdrawal			
8	Group Personal Pension			
9	Mortgage Endowment			
		Intermediaries provid	ling <i>Independent ad</i>	vice or Restricted advice
10	Endowment Assurance		<u> </u>	
11	Whole Life Assurance			
12	Personal Pension Policy			
13	Other Pension Policy			
14	Other Life Assurance			
15	Income Withdrawal			
16	Group Personal Pension			
17	Mortgage Endowment			
		Direct	t Offer Financial Pro	omotions
18	Endowment Assurance			
19	Whole Life Assurance			
20	Personal Pension Policy			
21	Other Pension Policy			
22	Other Life Assurance			
23	Income Withdrawal			
24	Group Personal Pension			
25	Mortgage Endowment			

	In force at	
In force at outset	anniversary	Persistency rate

Endowment Assurance
Whole Life Assurance
Personal Pension Policy
Other Pension Policy
Other Life Assurance
Income Withdrawal
Group Personal Pension
Mortgage Endowment

Other				

Section 2 - Single Premium - Y1

65

Mortgage Endowment

For each of the following products and distribution channels please provide the following details:

Α В C In force at In force at outset Persistency rate anniversary Company Representatives 34 **Endowment Assurance** 35 Whole Life Assurance 36 Personal Pension Policy 37 Other Pension Policy Other Life Assurance 38 39 Income Withdrawal 40 Group Personal Pension 41 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 42 **Endowment Assurance** 43 Whole Life Assurance 44 Personal Pension Policy 45 Other Pension Policy 46 Other Life Assurance 47 Income Withdrawal 48 Group Personal Pension 49 Mortgage Endowment Direct Offer Financial Promotions 50 **Endowment Assurance** 51 Whole Life Assurance 52 Personal Pension Policy 53 Other Pension Policy 54 Other Life Assurance 55 Income Withdrawal 56 Group Personal Pension 57 Mortgage Endowment Other 58 **Endowment Assurance** 59 Whole Life Assurance 60 Personal Pension Policy Other Pension Policy 61 62 Other Life Assurance 63 Income Withdrawal 64 Group Personal Pension

Section 3 - Regular Premium - Y2

97

Mortgage Endowment

For each of the following products and distribution channels please provide the following details:

Α В C In force at In force at outset anniversary Persistency rate Company Representatives 66 **Endowment Assurance** 67 Whole Life Assurance Personal Pension Policy 68 69 Other Pension Policy 70 Other Life Assurance 71 Income Withdrawal 72 **Group Personal Pension** 73 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 74 **Endowment Assurance** 75 Whole Life Assurance 76 Personal Pension Policy 77 Other Pension Policy 78 Other Life Assurance 79 Income Withdrawal 80 Group Personal Pension 81 Mortgage Endowment Direct Offer Financial Promotions 82 **Endowment Assurance** 83 Whole Life Assurance 84 Personal Pension Policy 85 Other Pension Policy Other Life Assurance 86 87 Income Withdrawal 88 Group Personal Pension 89 Mortgage Endowment Other 90 **Endowment Assurance** 91 Whole Life Assurance 92 Personal Pension Policy 93 Other Pension Policy 94 Other Life Assurance Income Withdrawal 95 Group Personal Pension 96

Section 4 - Single Premium - Y2

For each of the following products and distribution channels please provide the following details:

В C Α In force at In force at outset anniversary Persistency rate Company Representatives 98 **Endowment Assurance** 99 Whole Life Assurance 100 Personal Pension Policy 101 Other Pension Policy 102 Other Life Assurance 103 Income Withdrawal 104 **Group Personal Pension** 105 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 106 **Endowment Assurance** 107 Whole Life Assurance 108 Personal Pension Policy 109 Other Pension Policy 110 Other Life Assurance 111 Income Withdrawal 112 Group Personal Pension 113 Mortgage Endowment Direct Offer Financial Promotions 114 **Endowment Assurance** 115 Whole Life Assurance 116 Personal Pension Policy 117 Other Pension Policy 118 Other Life Assurance 119 Income Withdrawal 120 Group Personal Pension 121 Mortgage Endowment Other 122 **Endowment Assurance** 123 Whole Life Assurance 124 Personal Pension Policy 125 Other Pension Policy 126 Other Life Assurance 127 Income Withdrawal 128 **Group Personal Pension** 129 Mortgage Endowment

Section 5 - Regular Premium - Y3

For each of the following products and distribution channels please provide the following details:

В C Α In force at In force at outset anniversary Persistency rate Company Representatives 130 **Endowment Assurance** 131 Whole Life Assurance 132 Personal Pension Policy 133 Other Pension Policy 134 Other Life Assurance 135 Income Withdrawal 136 **Group Personal Pension** 137 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 138 **Endowment Assurance** 139 Whole Life Assurance 140 Personal Pension Policy 141 Other Pension Policy 142 Other Life Assurance 143 Income Withdrawal 144 Group Personal Pension 145 Mortgage Endowment Direct Offer Financial Promotions 146 **Endowment Assurance** 147 Whole Life Assurance 148 Personal Pension Policy 149 Other Pension Policy 150 Other Life Assurance 151 Income Withdrawal 152 Group Personal Pension 153 Mortgage Endowment Other 154 **Endowment Assurance** 155 Whole Life Assurance 156 Personal Pension Policy 157 Other Pension Policy 158 Other Life Assurance 159 Income Withdrawal 160 **Group Personal Pension** 161 Mortgage Endowment

Section 6 - Single Premium - Y3

193

Mortgage Endowment

For each of the following products and distribution channels please provide the following details:

Α В C In force at In force at outset anniversary Persistency rate Company Representatives 162 **Endowment Assurance** 163 Whole Life Assurance 164 Personal Pension Policy 165 Other Pension Policy 166 Other Life Assurance 167 Income Withdrawal 168 Group Personal Pension 169 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 170 **Endowment Assurance** 171 Whole Life Assurance 172 Personal Pension Policy 173 Other Pension Policy 174 Other Life Assurance 175 Income Withdrawal 176 Group Personal Pension 177 Mortgage Endowment Direct Offer Financial Promotions 178 **Endowment Assurance** 179 Whole Life Assurance 180 Personal Pension Policy 181 Other Pension Policy 182 Other Life Assurance 183 Income Withdrawal 184 Group Personal Pension 185 Mortgage Endowment Other 186 **Endowment Assurance** 187 Whole Life Assurance 188 Personal Pension Policy 189 Other Pension Policy 190 Other Life Assurance 191 Income Withdrawal 192 Group Personal Pension

Section 7 - Regular Premium - Y4

225

Mortgage Endowment

For each of the following products and distribution channels please provide the following details:

В C Α In force at In force at outset anniversary Persistency rate Company Representatives 194 **Endowment Assurance** 195 Whole Life Assurance 196 Personal Pension Policy 197 Other Pension Policy 198 Other Life Assurance 199 Income Withdrawal 200 Group Personal Pension 201 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 202 **Endowment Assurance** 203 Whole Life Assurance 204 Personal Pension Policy 205 Other Pension Policy 206 Other Life Assurance 207 Income Withdrawal 208 Group Personal Pension 209 Mortgage Endowment Direct Offer Financial Promotions 210 **Endowment Assurance** 211 Whole Life Assurance 212 Personal Pension Policy 213 Other Pension Policy 214 Other Life Assurance 215 Income Withdrawal 216 Group Personal Pension 217 Mortgage Endowment Other 218 **Endowment Assurance** 219 Whole Life Assurance 220 Personal Pension Policy 221 Other Pension Policy 222 Other Life Assurance 223 Income Withdrawal 224 Group Personal Pension

Section 8 - Single Premium - Y4

For each of the following products and distribution channels please provide the following details:

В C Α In force at In force at outset anniversary Persistency rate Company Representatives 226 **Endowment Assurance** 227 Whole Life Assurance 228 Personal Pension Policy 229 Other Pension Policy 230 Other Life Assurance 231 Income Withdrawal 232 **Group Personal Pension** 233 Mortgage Endowment Intermediaries providing Independent advice or Restricted advice 234 **Endowment Assurance** 235 Whole Life Assurance 236 Personal Pension Policy 237 Other Pension Policy 238 Other Life Assurance 239 Income Withdrawal 240 Group Personal Pension 241 Mortgage Endowment Direct Offer Financial Promotions 242 **Endowment Assurance** 243 Whole Life Assurance 244 Personal Pension Policy 245 Other Pension Policy 246 Other Life Assurance 247 Income Withdrawal 248 **Group Personal Pension** 249 Mortgage Endowment Other 250 **Endowment Assurance** 251 Whole Life Assurance 252 Personal Pension Policy 253 Other Pension Policy 254 Other Life Assurance 255 Income Withdrawal 256 **Group Personal Pension** 257 Mortgage Endowment

Stakeholder Pensions

Section 9 - Regular Premium - Y1

		Α	В	С
		In force at outset	In force at anniversary	Persistency rate
259	Regular premium stakeholder pensions	Con	npany <i>Representati</i>	ves
260	Substitute regular premium stakeholder pensions			
		Tukanna dianiaa muuddi	T d d t d - :	in an Danksinka danksina
261	Regular premium stakeholder pensions	Intermediaries providir	ig Independent advi	ce or Restricted advice
262	Substitute regular premium stakeholder pensions			
263	Regular premium stakeholder pensions	Direct (Offer Financial Pron	notions
264	Substitute regular premium stakeholder pensions			
204	Substitute regular premium stakenoluer pensions			
			Other	
265	Regular premium stakeholder pensions			
	Substitute regular premium stakeholder pensions			
	ion 10 – Single Premium – Y1 ach of the following products and distribut	ion channels please	e provide the fo	llowing details:
Secti	_	ion channels please	e provide the fo B	llowing details: C
Secti	_	_		_
Secti	_	A In force at outset	B In force at	C Persistency rate
Secti	_	A In force at outset	B In force at anniversary	C Persistency rate
Secti For e	ach of the following products and distribut	A In force at outset	B In force at anniversary	C Persistency rate
Secti For e	ach of the following products and distribut Single premium stakeholder pensions	In force at outset	In force at anniversary	C Persistency rate
Secti For e	ach of the following products and distribut Single premium stakeholder pensions	In force at outset	In force at anniversary	C Persistency rate
Sect i For e	ach of the following products and distribut Single premium stakeholder pensions Substitute single premium stakeholder pensions	In force at outset	In force at anniversary	C Persistency rate
Sect i For e 267 268	ach of the following products and distribut Single premium stakeholder pensions Substitute single premium stakeholder pensions Single premium stakeholder pensions	In force at outset Con Intermediaries providing	In force at anniversary	Persistency rate
Sect i For e 267 268	ach of the following products and distribut Single premium stakeholder pensions Substitute single premium stakeholder pensions Single premium stakeholder pensions	In force at outset Con Intermediaries providing	In force at anniversary mpany Representation	Persistency rate
267 268 269 270	ach of the following products and distribut Single premium stakeholder pensions Substitute single premium stakeholder pensions Single premium stakeholder pensions Substitute single premium stakeholder pensions	In force at outset Con Intermediaries providing	In force at anniversary mpany Representation	Persistency rate
267 268 269 270	ach of the following products and distribut Single premium stakeholder pensions Substitute single premium stakeholder pensions Single premium stakeholder pensions Substitute single premium stakeholder pensions Substitute single premium stakeholder pensions	In force at outset Con Intermediaries providing	In force at anniversary npany Representations ng Independent advi	Persistency rate
267 268 269 270	ach of the following products and distribut Single premium stakeholder pensions Substitute single premium stakeholder pensions Single premium stakeholder pensions Substitute single premium stakeholder pensions Substitute single premium stakeholder pensions	In force at outset Con Intermediaries providing	In force at anniversary mpany Representation	Persistency rate

Section 11 - Regular Premium - Y2

		Α	В	С
		In force at outset	In force at	Porsistancy rate
		In force at outset	anniversary	Persistency rate
		Coi	mpany <i>Representati</i>	ives
275	Regular premium stakeholder pensions		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
276	Substitute regular premium stakeholder pensions			
		Intermediaries providi	ng <i>Independent advi</i>	ce or Restricted advice
277	Regular premium stakeholder pensions			
278	Substitute regular premium stakeholder pensions			
		Divont	Offen Financial Draw	nationa
		Direct	Offer Financial Pron	TIOLIOTIS
279	Regular premium stakeholder pensions			
280	Substitute regular premium stakeholder pensions			
			Other	
281	Regular premium stakeholder pensions			
282	Substitute regular premium stakeholder pensions			
Sect	ion 12 – Single Premium – Y2			
or e	ach of the following products and distribut	ion channels please	e provide the fo	llowing details:
	F		- р. оттого	
		Α	В	С
		In force at outset	In force at anniversary	Persistency rate
		In force at outset	anniversary	Tersistency rate
		Cor	mpany <i>Representati</i>	ives
283	Single premium stakeholder pensions			
284	Substitute single premium stakeholder pensions			
		Intermediaries providi	ng <i>Independent advi</i>	ce or Restricted advice
285	Single premium stakeholder pensions			
286	Substitute single premium stakeholder pensions			
		Direct	Offer Financial Pron	notions
797	Single promium stakeholder pensions	Direct	oner i manetar i ron	
287	Single premium stakeholder pensions			
288	Substitute single premium stakeholder pensions			
			Other	
289	Single premium stakeholder pensions			
290	Substitute single premium stakeholder pensions			

Section 13 - Regular Premium - Y3

		A	В	C
			In force at	
		In force at outset	anniversary	Persistency rate
		Cor	mpany <i>Representati</i>	ves
291	Regular premium stakeholder pensions			
292	Substitute regular premium stakeholder pensions			
		Intermediaries providi	ng <i>Independent advi</i>	ce or Restricted advice
293	Regular premium stakeholder pensions			
294	Substitute regular premium stakeholder pensions			
		Direct	Offer Financial Pron	notions
295	Regular premium stakeholder pensions			
296	Substitute regular premium stakeholder pensions			
			Othor	
			Other	
297	Regular premium stakeholder pensions			
298	Substitute regular premium stakeholder pensions			
Secti	ion 14 – Single Premium – Y3			
For a	ach of the following products and distributi	on channels please	a provide the fol	lowing details:
01 6	acif of the following products and distributi	on channels piease	e provide the for	lowing details.
		Α	В	С
			In force at	
		In force at outset	anniversary	Persistency rate
		Cor	mpany <i>Representati</i>	ves
299	Single premium stakeholder pensions			
300	Substitute single premium stakeholder pensions			
		Intermediaries providi	ng <i>Independent advi</i>	ce or Restricted advice
301	Single premium stakeholder pensions			
302	Substitute single premium stakeholder pensions			
		Direct	Offer Financial Pron	notions
303	Single premium stakeholder pensions			
304	Substitute single premium stakeholder pensions			
	·		<u> </u>	1
			Other	
205	Single premium stakeholder pensions		- Carici	
305	amore premium stakenoider bensions	1	1	1
306	Substitute single premium stakeholder pensions			

Section 15 - Regular Premium - Y4

		Α	В	C
			I	1
		In force at outset	In force at anniversary	Persistency rate
		in force at outset	aversary	Terbioteriey race
		Cor	mpany <i>Representati</i>	ives
307	Regular premium stakeholder pensions			
308	Substitute regular premium stakeholder pensions			
		Intermediaries providi	ng <i>Independent advi</i>	ce or Restricted advice
309	Regular premium stakeholder pensions			
310	Substitute regular premium stakeholder pensions			
		Direct	Offer Financial Pron	notions
311	Regular premium stakeholder pensions	Биссс		liotions
	• ,			
312	Substitute regular premium stakeholder pensions			
			Other	
313	Regular premium stakeholder pensions			
314	Substitute regular premium stakeholder pensions			
	ion 16 – Single Premium – Y4 ach of the following products and distribut	ion channels please	e provide the fo	llowing details:
		Α	В	С
		In fours at subset	In force at	Dannistan av vata
		In force at outset	anniversary	Persistency rate
		Cor	mpany <i>Representati</i>	ives
315	Single premium stakeholder pensions		. , ,	
316	Substitute single premium stakeholder pensions			
		Intermediaries providi	ng <i>Independent advi</i>	ce or Restricted advice
317	Single premium stakeholder pensions			
318	Substitute single premium stakeholder pensions			
		Direct	Offer Financial Pron	notions
319	Single premium stakeholder pensions	2.7660		
320	Substitute single premium stakeholder pensions			
J2U	Substitute single premium stakeholder pensions			
			Other	
221	Single promium stakeholder acceione		Other	
321	Single premium stakeholder pensions			
322	Substitute single premium stakeholder pensions	1	1	1