

III Health Medical Declaration

To be completed by the registered medical practitioner and returned to the account holder.

Patient details

Patient name

Date of birth

Postcode

Monzo Pension account number

Your patient named above wishes to retire early as a result of ill health.

For this to happen, HMRC needs evidence that, at the time the patient is taking their retirement benefits, FNZ Securities Ltd (the scheme administrator) has evidence from a registered medical practitioner that the patient has an ill health condition which results them being medically incapable (either physically or mentally) of continuing their current occupation.

This could be as a result of:

- Injury
- Sickness
- Disease; or
- Disability

'Current occupation' description

The patient looking to take retirement benefits due to ill health must meet the ill health conditions, which means they are, and will continue to be unable to continue their essential duties in their current occupation.

The essential duties of an occupation are those that can't be removed from the job role without affecting the ability to carry out that occupation.

Declaration

- I confirm that my patient named above is medically incapable of continuing his or her current occupation.
- I confirm that my patient has provided me with this form and consented for the requested information to be shared.

Surgery name

Surgery address

Name of registered medical practitioner
(Doctor)

Signature of registered medical
practitioner
(Doctor)

Date

GMC reference number

Surgery stamp