Monzo Bank Broadwalk House, 5 Appold Street, London EC2A 2AG



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III Health Medical Declaration

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

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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.

Monzo Bank Limited (Monzo) is a company registered in England and Wales (No. 09446231) registered at Broadwalk House, 5 Appold Street, London EC2A 2AG. Monzo is authorised by the Prudential Regulation Authority (PRA) and regulated by the Financial Conduct Authority and the PRA. Our Financial Services Register number is 730427.

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	

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