

Serious Ill 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 fully convert their retirement benefits for a lump sum payment.

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's life expectancy is **less than a year**.

Declaration

- I can confirm that, in my medical opinion, the life expectancy of the above patient is less than one year.
- I understand that I will not be held liable if my patient lives longer than one year from the date below.

Surgery name

Surgery address

Name of registered medical practitioner
(Doctor)

Signature of registered medical
practitioner
(Doctor)

Date

GMC reference number

Surgery stamp