

# SUP Ann 6R: Persistency Report

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

**REP003 – Persistency reporting**

**Nil Return Declaration**

**A**

1 Do you wish to report a nil return for life policies?

258 Do you wish to report a nil return for stakeholder pensions?

**Life Policies**

**A**

**B**

**C**

**Section 1 – Regular Premium – Y1**

	In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>			
2 Endowment Assurance			
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			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>			
10 Endowment Assurance			
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			
<b>Direct Offer Financial Promotions</b>			
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			



**Section 2 – Single Premium – Y1**

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
34	Endowment Assurance			
35	Whole Life Assurance			
36	Personal Pension Policy			
37	Other Pension Policy			
38	Other Life Assurance			
39	Income Withdrawal			
40	Group Personal Pension			
41	Mortgage Endowment			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
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			
<b>Direct Offer Financial Promotions</b>				
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			
<b>Other</b>				
58	Endowment Assurance			
59	Whole Life Assurance			
60	Personal Pension Policy			
61	Other Pension Policy			
62	Other Life Assurance			
63	Income Withdrawal			
64	Group Personal Pension			
65	Mortgage Endowment			



**Section 4 – Single Premium – Y2**

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
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			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
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			
<b>Direct Offer Financial Promotions</b>				
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			
<b>Other</b>				
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 6 – Single Premium – Y3

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
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			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
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			
<b>Direct Offer Financial Promotions</b>				
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			
<b>Other</b>				
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			
193	Mortgage Endowment			



**Section 7 – Regular Premium – Y4**

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
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			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
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			
<b>Direct Offer Financial Promotions</b>				
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			
<b>Other</b>				
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			
225	Mortgage Endowment			

**Section 8 – Single Premium – Y4**

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
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			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
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			
<b>Direct Offer Financial Promotions</b>				
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			
<b>Other</b>				
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

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

		A	B	C
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
259	Regular premium stakeholder pensions			
260	Substitute regular premium stakeholder pensions			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
261	Regular premium stakeholder pensions			
262	Substitute regular premium stakeholder pensions			
<b>Direct Offer Financial Promotions</b>				
263	Regular premium stakeholder pensions			
264	Substitute regular premium stakeholder pensions			
<b>Other</b>				
265	Regular premium stakeholder pensions			
266	Substitute regular premium stakeholder pensions			

## Section 10 – Single Premium – Y1

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

		A	B	C
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
267	Single premium stakeholder pensions			
268	Substitute single premium stakeholder pensions			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
269	Single premium stakeholder pensions			
270	Substitute single premium stakeholder pensions			
<b>Direct Offer Financial Promotions</b>				
271	Single premium stakeholder pensions			
272	Substitute single premium stakeholder pensions			
<b>Other</b>				
273	Single premium stakeholder pensions			
274	Substitute single premium stakeholder pensions			

## Section 11 – Regular Premium – Y2

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

		A	B	C
		In force at outset	In force at anniversary	Persistency rate
		<i>Company Representatives</i>		
275	Regular premium stakeholder pensions			
276	Substitute regular premium stakeholder pensions			
		<i>Intermediaries providing Independent advice or Restricted advice</i>		
277	Regular premium stakeholder pensions			
278	Substitute regular premium stakeholder pensions			
		<i>Direct Offer Financial Promotions</i>		
279	Regular premium stakeholder pensions			
280	Substitute regular premium stakeholder pensions			
		<i>Other</i>		
281	Regular premium stakeholder pensions			
282	Substitute regular premium stakeholder pensions			

## Section 12 – Single Premium – Y2

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

		A	B	C
		In force at outset	In force at anniversary	Persistency rate
		<i>Company Representatives</i>		
283	Single premium stakeholder pensions			
284	Substitute single premium stakeholder pensions			
		<i>Intermediaries providing Independent advice or Restricted advice</i>		
285	Single premium stakeholder pensions			
286	Substitute single premium stakeholder pensions			
		<i>Direct Offer Financial Promotions</i>		
287	Single premium stakeholder pensions			
288	Substitute single premium stakeholder pensions			
		<i>Other</i>		
289	Single premium stakeholder pensions			
290	Substitute single premium stakeholder pensions			

### Section 13 – Regular Premium – Y3

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
291	Regular premium stakeholder pensions			
292	Substitute regular premium stakeholder pensions			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
293	Regular premium stakeholder pensions			
294	Substitute regular premium stakeholder pensions			
<b>Direct Offer Financial Promotions</b>				
295	Regular premium stakeholder pensions			
296	Substitute regular premium stakeholder pensions			
<b>Other</b>				
297	Regular premium stakeholder pensions			
298	Substitute regular premium stakeholder pensions			

### Section 14 – Single Premium – Y3

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
<b>Company Representatives</b>				
299	Single premium stakeholder pensions			
300	Substitute single premium stakeholder pensions			
<b>Intermediaries providing <i>Independent advice</i> or <i>Restricted advice</i></b>				
301	Single premium stakeholder pensions			
302	Substitute single premium stakeholder pensions			
<b>Direct Offer Financial Promotions</b>				
303	Single premium stakeholder pensions			
304	Substitute single premium stakeholder pensions			
<b>Other</b>				
305	Single premium stakeholder pensions			
306	Substitute single premium stakeholder pensions			

### Section 15 – Regular Premium – Y4

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
		<i>Company Representatives</i>		
307	Regular premium stakeholder pensions			
308	Substitute regular premium stakeholder pensions			
		<i>Intermediaries providing Independent advice or Restricted advice</i>		
309	Regular premium stakeholder pensions			
310	Substitute regular premium stakeholder pensions			
		<i>Direct Offer Financial Promotions</i>		
311	Regular premium stakeholder pensions			
312	Substitute regular premium stakeholder pensions			
		<i>Other</i>		
313	Regular premium stakeholder pensions			
314	Substitute regular premium stakeholder pensions			

### Section 16 – Single Premium – Y4

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

		<b>A</b>	<b>B</b>	<b>C</b>
		In force at outset	In force at anniversary	Persistency rate
		<i>Company Representatives</i>		
315	Single premium stakeholder pensions			
316	Substitute single premium stakeholder pensions			
		<i>Intermediaries providing Independent advice or Restricted advice</i>		
317	Single premium stakeholder pensions			
318	Substitute single premium stakeholder pensions			
		<i>Direct Offer Financial Promotions</i>		
319	Single premium stakeholder pensions			
320	Substitute single premium stakeholder pensions			
		<i>Other</i>		
321	Single premium stakeholder pensions			
322	Substitute single premium stakeholder pensions			