

Individual details for members who are interested in a transfer of benefits from The Pearson Pension Plan (the Plan) are provided in the transfer-out statements which are sent to members' home addresses at the date of their leaving Pearson employment. The statements include transfer values and full details of deferred pensions.

The Plan is split into separate sections, each with its own benefit structure.

The two defined contribution sections are the Money Purchase 2003 Section and the Auto Enrolment Section. The investment provider for these sections is Aviva. Members have access to details of their pension pot and investment performance records through MyWorkplace, Aviva's secure online portal – <https://workplace.aviva.co.uk/myworkplace/>





The information provided below is based on the current Rules of the Plan and these sections and legislation is provided for guidance only. It does not confer any rights or entitlements. A copy of the General and Section Rules, which legally govern the Plan, is available from the Plan (address below).

Plan name:	The Pearson Pension Plan
Registered address:	The Pearson Pension Plan, Mezzanine Floor, 80 Strand, London, WC2R ORL
Trustee:	The Pearson Pension Trustee Limited <ul style="list-style-type: none">• three A directors selected by Pearson• three A directors nominated by members• three B directors who appoint their own successors
Tax status:	Registered pension scheme under the Finance Act 2004
Tax reference number:	00281436RK
ECON:	E3806857Y
SCON:	S0607419Q



Awarded for the
Plan's Money Purchase
2003 section

Information for financial advisers

Contracted out status:	Contracted out of the State Second Pension on the reference scheme test basis up to 5 April 2016. Guaranteed Minimum Pension (GMP) preserved for pre- 6 April 1997 benefits. The Auto Enrolment Section was not contracted out.
Contracted out benefits:	Must be transferred with Plan benefits.
Winding-up:	The Plan is not being wound up.
Transfer Club:	The Plan is not a member of a transfer club.
Early retirement:	Can be applied for at any time after age 55. Company consent required.
Tax-free cash:	Maximum tax-free cash payable (better of pre and post A Day limits) through commutation, subject to contracting-out conditions.
Funding position:	Details available at: www.pearson-pensions.com
Additional voluntary contributions (AVCs):	AVCs do not purchase added years in the Plan and are invested on a money purchase basis with the Plan's external AVCs providers
Pension sharing on divorce:	Membership of the Plan is not offered in respect of any pension credit that may be awarded to an ex-spouse. The pension credit must be transferred to another pension arrangement.
Plan report and accounts:	Details available at: www.pearson-pensions.com
Statement of investment principles:	Details available at: www.pearson-pensions.com
Contact details:	 Pearson Pension Plan, PO Box 9519, Sherborne, DT9 9EN  www.pearson-pensions.com  pensions.helpline@pearson.com  +44 (0)800 7811378