

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 – [workplace.aviva.co.uk/myworkplace](https://workplace.aviva.co.uk/myworkplace)

The information provided is based on the Rules of the Plan and current legislation and is provided for guidance only.





Plan name:	The Pearson Pension Plan
Registered address:	The Pearson Pension Plan, 80 Strand, London, WC2R 0RL
Trustee:	The Pearson Pension Trustee Limited <ul style="list-style-type: none"> <li>• three A directors selected by Pearson</li> <li>• three A directors nominated by members</li> <li>• three B directors who appoint their own successors</li> </ul>
Tax status:	Registered pension scheme under the Finance Act 2004
Tax reference number:	00281436RK
ECON:	E3806857Y
SCON:	S0607419Q
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.



Awarded for the  
Plan's Money Purchase  
2003 section



## Information for financial advisers

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: <a href="http://www.pearson-pensions.com/library/#governance-financial-reports">www.pearson-pensions.com/library/#governance-financial-reports</a>
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: <a href="http://www.pearson-pensions.com/library/#governance-financial-reports">www.pearson-pensions.com/library/#governance-financial-reports</a>
Statement of investment principles:	Details available at: <a href="http://www.pearson-pensions.com/library/#governance-financial-reports">www.pearson-pensions.com/library/#governance-financial-reports</a>
Contact details:	<p> The Pearson Pension Plan, PO Box 645, Darlington, DL1 9HP</p> <p> <a href="http://www.pearson-pensions.com">www.pearson-pensions.com</a></p> <p> <a href="mailto:pensions.helpline@pearson.com">pensions.helpline@pearson.com</a></p> <p> Helpline: (Freephone) 0800 7811378 (+44 203 7888562 if calling from outside the UK). Phone lines are open Monday – Friday 8:30am – 5:30pm, excluding bank holidays</p>