

Notice of Election (Mandatory Scheme Pays)

If you would like to use the Mandatory Scheme Pays facility, please complete this Notice and return it to the Plan Administrators by 31 July 2026.

1. Your details

Title: _____ First name(s): _____
Surname: _____ Sex: ☐ Male ☐ Female
National Insurance number: _____ Date of birth: _____
Home address: _____
Postcode: _____

2. Annual Allowance (AA) tax charge

Tax year to which the AA tax charge relates: 2024/25
Amount of total AA tax charge: _____
Amount of AA tax charge you want to be paid from the Plan: _____

3. Adjustment of your Plan benefits

Please indicate how you would like your Plan benefits to be adjusted to meet the cost of the AA tax charge.

By deduction from my Money Purchase benefits

The AA tax charge will be met first from your Additional Voluntary Contributions (AVCs) (if any) and then, if the charge is more than your AVCs, from your benefits in the DC Section (if any). The appropriate number of units will be sold from your Pension Account on a pro-rata basis. If you would like the deduction to be made from a specific fund/s, please complete the table below:

Fund name	Proportion of total amount* (%)
-----------	---------------------------------

* The proportions must be whole numbers and must add up to 100%.

Member declaration

1. I have read and understood the information provided to me regarding the Mandatory Scheme Pays facility, the adjustment of my Plan benefits and this Notice.
2. This Notice is issued of my own choice and I understand and acknowledge that neither the Trustee nor my Employer takes any responsibility for my decision to issue this Notice nor can they provide any form of advice as to whether the use of Mandatory Scheme Pays is in my best interests.
3. In making my decision to issue this Notice, I have taken and relied on such independent financial advice as I consider to be appropriate and I have not relied upon any representation made by the Trustee or my Employer.
4. I understand that:
 - (a) Once this Notice is received by the Plan Administrators it cannot be withdrawn or revoked and the Trustee becomes jointly and severally liable with me for the amount of the AA tax charge I have asked the Plan to pay, as stated above.
 - (b) This Notice must be received by the Plan Administrators before I draw my Plan benefits, reach age 75 and/or transfer my Plan benefits out of the Plan.
 - (c) My Plan benefits will be adjusted to take account of the payment of the AA tax charge made by the Trustee on my behalf, pursuant to this Notice. Where the amount of the tax charge is more than the Plan benefits I have nominated, the remaining tax liability will be met from my other Plan benefits. The adjustment of my benefits could have an indirect impact on benefits payable in the event of my death.
 - (d) The Trustee and/or the Employer will have no liability to me, or anyone claiming in respect of me, in relation to any Plan benefits utilised in applying the adjustment referred to in (c) above.
 - (e) The Trustee may refuse to give effect to this Notice, and/or any amendment I make to it, in the circumstances set out in the Finance Act 2004 and the Trustee will inform me if this applies.
 - (f) In respect of the AA tax charge stated above, I will be responsible for completing any HM Revenue and Customs (HMRC) reporting requirements in connection with using Mandatory Scheme Pays. If I have asked for part of the total AA tax charge to be paid from the Plan, I will remain responsible for paying the remainder of the tax charge directly to HMRC. If for any reason the benefits are not sufficient to cover the tax charge, I remain liable for the balance.
 - (g) If any refund becomes payable from HMRC in respect of the amount paid by the Trustee pursuant to this Notice (for example because my AA tax charge liability reduces), my Plan benefits may be adjusted on such basis as the Trustee determines, on actuarial advice, to take account of the refunded amount.
5. I confirm that:
 - (a) The amount of the AA tax charge stated above has been calculated at the proper rate as described in section 237B(4) of the Finance Act 2004;
 - (b) My pension input amount for the Plan in the relevant tax year was more than £60,000; and
 - (c) I will not reach age 75 in the tax year to which my AA tax charge relates.

Signature:

Date:

Notice of Election

Instructions

Please return your completed Notice of Election form to the Plan Administrators at the following address:
TotalEnergies UK Pension Plan, Gallagher (Bristol), PO Box 319, Mitcheldean, Gloucestershire, GL14 9BF.

You can also return your completed Notice of Election to the Plan Administrators by email to
TEpensionsadmin@ajg.com

The Plan Administrators must receive your completed Notice of Election by **31 July 2026**.

Please contact the Plan Administrators if you have any queries regarding the Scheme Pays facility and/or this Notice.

Next steps

You should receive an acknowledgement from the Plan Administrators confirming that your Notice of Election has been received. If you do not receive an acknowledgement within 10 working days then please contact the Plan Administrators on **0330 123 9570**.

Important information

The Trustee needs to hold and process personal information about you in order to administer the Plan and your benefits.

From time to time information may, in order to facilitate the running of the Plan, need to be passed to the Trustee's professional advisers or delegates. At all times this personal information will be held and processed in accordance with the Data Protection Act 2018 and related legislation.

Please note that all entitlements to benefits are subject to the Plan Rules as amended from time to time, and benefits provided by the Plan are subject to the requirements of current and future legislation including overriding tax and pensions legislation.