

Long-term insurance business: With-profits payouts on surrender

Form 59B

Name of insurer: [Phoenix & London Assurance Limited](#)
 Original insurer: [Sun Alliance & London Assurance Limited](#)
 Date of surrender value: [1st March 2009](#)

| Category of with-profits policy 1 | Duration at Surr'r (Yrs) 2 | Surrender Value 3 | Terminal Bonus 4 | MVA 5 | CWP / UWP 6 | MVA permitted? 7 | Death Benefit 8 |
|---|--------------------------------------|-----------------------------|----------------------------|-----------------|-----------------------|----------------------------|---------------------------|
| Endowment Assurance | 5 | n/a | n/a | n/a | n/a | n/a | n/a |
| Endowment Assurance | 10 | 6,054 | 0 | n/a | CWP | N | GMDB |
| Endowment Assurance | 15 | 8,203 | 0 | n/a | CWP | N | SA + B |
| Endowment Assurance | 20 | 15,988 | 0 | n/a | CWP | N | SA + B |
| With-profits bond | 2 | n/a | n/a | n/a | n/a | n/a | n/a |
| With-profits bond | 3 | n/a | n/a | n/a | n/a | n/a | n/a |
| With-profits bond | 5 | n/a | n/a | n/a | n/a | n/a | n/a |
| With-profits bond | 10 | n/a | n/a | n/a | n/a | n/a | n/a |
| Single Premium Pension | 2 | n/a | n/a | n/a | n/a | n/a | n/a |
| Single Premium Pension | 3 | n/a | n/a | n/a | n/a | n/a | n/a |
| Single Premium Pension | 5 | n/a | n/a | n/a | n/a | n/a | n/a |
| Single Premium Pension | 10 | 11,200 | 0 | 843 | UWP | Y | Return of Fund |