For customers and scheme trustees

Request to transfer to another provider

Please read these notes before filling in this form.

About this form

This form is for transferring your pension fund with Aegon to another provider (the receiving scheme).

Before completing this form please check to see if the receiving scheme uses the Options Transfer Service by visiting **origoservices.com/OurServices/OptionsTransfers/Options_Transfers_Customers.aspx**

If the receiving scheme does use the Options Transfer Service, contact them directly to issue you with the forms you need to complete, instead of using this one.

This form cannot be used for overseas transfers, please contact us for information on transferring overseas.

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document please call 03456 10 00 10 (call charges will vary) or visit **aegon.co.uk/onlineform**

Completing this form

This form is split into three parts. The part you complete will depend on the plan you have with us.

How to avoid investment scams

Your pension is one of your most valuable assets. Like anything valuable, your pension can become the target for illegal activities, scams or offers of inappropriate and high risk investments. Find out more about the steps you can take to protect yourself from pension and investment scams and how to avoid them – visit **fca.org.uk/scamsmart** and **pension-scams.com**

Part A – Transfer instruction (non-occupational pension schemes)

Complete Part A if you have a:

- Personal Pension plan, Group Personal Pension plan or Group Self-invested Personal Pension plan;
- Stakeholder Pension plan or a Group Stakeholder Pension plan;
- Flexible Pension Plan;
- Retirement Control plan;
- Reflex Personal Pension plan;
- Reflex Control Pension plan;
- Retirement annuity plan; or
- a Section 32 Buyout plan or a Trustee proposed Section 32 Buyout plan.

Then send the form to the receiving scheme.

Part B – Transfer instruction (occupational pension schemes)

Complete Part B if you are a scheme trustee of:

- an Executive Pension plan;
- a Small Self-administered scheme;
- an Exsel Group scheme;
- a Nexus scheme;
- a SEL scheme;
- an Exsel scheme; or
- an Exselfund scheme.

Then send the form to the receiving scheme.

Part C – The receiving scheme completes Part C and should return the completed form to Freepost RUCB-UKR-HHBU, Aegon, Sunderland, SR43 4DU.

Additional information

- Please complete this form in BLOCK CAPITALS and ballpoint pen.
- We explain terms shown in bold in the definitions section in Part D.

Part A – Transfer instruction (non-occupational pension schemes)

1. Guidance or regulated advice – you must complete this section if you're age 50 or over

You must complete this section if you're age 50 or over and transferring with the intention of accessing your retirement benefits.

We strongly recommend you take guidance from Pension Wise. The purpose of this guidance is to help you make an informed decision about your pension savings and the different options available to you when you come to access them.

Pension Wise, a service from MoneyHelper, is a free and impartial government service offering guidance about your retirement options. Appointments with an independent pension specialist are available by phone or face-to-face.

If you'd like us to book you an appointment with Pension Wise, please call 03456 10 00 10 or you can book one yourself at **moneyhelper.org.uk/pensionwise** or by calling 0800 138 3944.

We also recommend you seek regulated advice from a financial adviser. There will be a cost for this service. If you don't have a financial adviser, you can visit **moneyhelper.org.uk/choosing-a-financial-adviser** to find the right one for you.

If you want to take guidance from Pension Wise and/or regulated advice from a financial adviser, you need to have had this guidance and/or advice before you can complete this form.

1.1 Are you age 50 or over and intending to access your retirement benefits?

- ☐ Yes – go to 1.2.
- ☑ No – go to section 2.

1.2 Have you received regulated advice from a financial adviser?

- ☐ Yes
- ☐ No – we recommend you seek regulated advice as detailed.

1.3 Have you received guidance from Pension Wise?

- ☐ Yes
- ☐ No – we recommend you seek guidance as detailed. If you don't want to use Pension Wise, you need to opt out of this at 1.4.

1.4 ☐ Please tick this box if you want to opt-out of taking guidance from Pension Wise and go to section 2.

If you've already received guidance or regulated advice, you may want to do this again if there's been any significant change to your pension fund or personal circumstances.

2. Personal details

Title

Mr / Mrs / Miss / Ms / Other – please specify

Mr.

Full forename(s)

Miroslaw Maciej

Surname

Sroka

Phone number

07738584443

Email address

miro@akorsproperty.com

Date of birth

2 4 | 0 2 | 1 9 7 7

National Insurance number

S E 1 8 4 0 4 3 D

Plan number (the 'plan')

8801030

3. Transfer details

I want you to pay the transfer value of my plan to:

Receiving insurer name

RC Administration Limited (Akors SSAS)

Reference

PTI - Miro Sroka

Address

1A Park Lane,

Poynton

Cheshire

Postcode SK12 1RD

4. Declaration

In this declaration 'I' means the individual named in Section 1 and 'you' means Aegon.

4.1 I request that you pay the transfer value of the plan to the receiving scheme.

4.2 I confirm that this payment represents a full discharge of your liabilities under the plan.

4.3 I've been made aware of my pension options, tax implications and associated risks by Pension Wise, Aegon or an adviser.

4.4 I confirm that where this is a transfer to an occupational scheme, that I have an employment link to the employer of the receiving scheme.

4.5 I declare that all information provided is correct.

Date

D D | M M | 2 0 Y Y

Planholder signature

X Miroslaw Sroka X

Part B – Transfer instruction (occupational pension schemes)

5. Member's personal details

Please enter the member's details

Title

Mr / Mrs / Miss / Ms / Other – please specify

Mr.

Full forename(s)

Miroslaw Maciej

Surname

Sroka

Date of birth

2 4 0 2 1 9 7 7

National Insurance number

S E 1 8 4 0 4 3 D

Plan number (the 'plan')

6. Transfer details

We want you to pay the transfer value for the member to:

Receiving insurer name

RC Administration Limited (Akors SSAS)

Reference

PTI - Miro Sroka

Address

1A Park Lane,
Poynton

Cheshire

Postcode SK12 1RD

7. Trustee's contact details

Please enter contact details of the trustee

Trustee's name

Miroslaw Sroka & Agnieszka Niewiadomska

Phone number

07738584443 & 07894608292

Email address

miro@akorsproperty.com & aga@akorsproperty.com

8. Declaration

In this declaration 'we' means the scheme trustees and 'you' means Aegon.

8.1 We request that you pay the transfer value of the policy to the receiving scheme.

8.2 We confirm that this payment represents a full discharge of your liabilities under the policy.

8.3 We confirm that where this is a transfer to an occupational scheme, the scheme member has an employment link to the employer of the receiving scheme.

8.4 We declare that all information provided is correct.

Date

D	D	M	M	2	0	Y	Y

Scheme trustees (print names)

Miroslaw Sroka

Agnieszka Niewiadomska

Scheme trustees (signatures)

✗ Miroslaw Sroka ✗

✗ Niewiadowska A. ✗

Part C – Receiving scheme declaration

9. Bank details

9.1 **Please give details of where the transfer payment is to be made.**

Name of bank

Metro Bank

Address

One Southampton Row
London,

Postcode WC1B 5HA

9.2 **Receiving scheme contact details**

Phone number

0330 311 0839

Email

Info@rcadministration.com

Bank sort code

23-05-80

Account number

47720745

Account Name: AKORS SSAS

10. Pension transfer confirmation

10.1 We undertake that the receiving scheme is: (please tick one only)

- [ ] Master trust (a multi-employer occupational pension scheme which can have unrelated employers)
- [ ] Registered defined benefit occupational pension scheme (trust based scheme provided by an employer)
- [x] Registered defined contribution occupational pension scheme (trust based scheme provided by an employer)
- [ ] Personal pension arrangement (which could be a group personal pension as part of an employer's scheme)
- [ ] Collective defined contribution (CDC) scheme
- [ ] Public service pension scheme
- [ ] Trustee proposed section 32 or section 32
- [ ] Drawdown pension plan
- [ ] Any other arrangement approved by HM Revenue & Customs

Please confirm details below:

10.2 Occupational schemes only

- [x] We confirm that the scheme member has an employment link to the employer of the receiving scheme and that the transfer can only proceed if this is the case.

11. Declaration

In this declaration 'I/we' means the receiving scheme and 'you' means Aegon.

11.1 I/We confirm that the receiving scheme is:

- [x] A UK pension scheme registered by HM Revenue & Customs (HMRC) under Chapter 2 of Part 4 of the Finance Act 2004. The HMRC reference is:

And attach a copy of our HMRC scheme registration certificate **that we have clearly printed from Pension Schemes Online within the last 30 days.**

11.2 I/We declare that the receiving scheme is prepared to accept the transfer payment and that it will be used to provide appropriate retirement benefits within the receiving arrangement. We confirm that the information given is accurate to the best of my/our knowledge and belief.

11.3 I/We declare that I/we have full power to give this declaration on behalf of the receiving scheme.

Date

0 1 0 8 2 0 2 3

Signed for and on behalf of the receiving scheme

X [signature] X

Position

Administrator

Part D – Definitions

Non-occupational pension scheme – is a contract-based pension scheme, such as a:

- Personal pension;
- Group Personal pension;
- Stakeholder pension;
- Group Stakeholder pension;
- Retirement annuity contract; (section 226 contract);
- Section 32 buyout; or
- Trustee proposed section 32 buyout.

Occupational pension scheme – is a trust based pension scheme, such as:

- an Executive Pension plan;
- a Small self-administered scheme;
- an Exsel Group scheme;
- a Nexus scheme;
- a SEL scheme;
- an Exsel scheme; or
- an Exselfund scheme.