

Transfer to another plan

Please complete and return this form if you are taking a transfer

K L Fabian

Plan number: 3778951

Plan type: Income Release Plan

Transfer value as at 18 May 2022: £144,320.16

This includes the value of your ProfitShare account: £1,209.63

How would you like to use your pension fund?

Option	Please tick
Transfer to a new provider	<input checked="" type="checkbox"/>

Are you transferring to an overseas scheme?

Please confirm if you are transferring your pension fund to an overseas scheme.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Is the total value of your pension benefits, including those already in payment, likely to be more than £1.0731m?	Yes <input type="checkbox"/> No <input type="checkbox"/>

① We will only transfer to an overseas scheme that is a Qualifying Recognised Overseas Pension Scheme. Your transfer payment may be subject to an overseas transfer charge of 25%.

We will contact you before carrying out the transfer if your transfer value will be subject to this charge. Where the charge applies, it will be deducted from your transfer value and sent to HM Revenue & Customs before the transfer is paid to the receiving scheme.

Contact information

Daytime telephone number (include STD code)	<input type="text" value="0"/> <input type="text" value="7"/> <input type="text" value="9"/> <input type="text" value="2"/> <input type="text" value="1"/> <input type="text" value="3"/> <input type="text" value="0"/> <input type="text" value="9"/> <input type="text" value="1"/> <input type="text" value="7"/> <input type="text" value="2"/>
The name and telephone number of your adviser.	<input type="text" value="N/A"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

① We may contact you if we require any further information in order for us to process your request.

Only required if you have consulted an adviser.

Transfer to another plan (continued)

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You don't have to complete this form

Rather than completing this form we will accept the following instead:

- confirmation from the new provider that they will accept the funds
- a signed copy of the new provider's application form
- the new provider's Pension Scheme Tax Reference (PSTR)
- the new provider's account and payee details

① This is not available if you are transferring to an overseas scheme.

Declaration

Planholder

I certify that the answers I've given are correct and complete to the best of my knowledge. If further tax becomes payable because the information I've provided above is proven to be incorrect then I understand that I'll be wholly and personally liable for the tax charge due and any resultant penalty as may be imposed by HM Revenue & Customs.

Please pay the transfer value to the named provider. Payment as instructed will mean that I shall no longer be entitled to receive pension or other benefits from this plan with the Royal London Mutual Insurance Society Limited, or from that portion of the plan transferred where a partial transfer is effected.

When you are transferring to an overseas scheme, by signing this declaration you are also agreeing to the following:

- I understand that by transferring my pension fund to an overseas scheme I may not receive the same amount of protection.
- where the overseas pension scheme I am transferring to is an occupational scheme, I confirm that I am employed by the sponsoring employer.
- I have received an illustration of benefits from the overseas provider.
- Where my pension transfer gives rise to the overseas transfer charge, I agree to Royal London deducting the charge from my transfer value and paying it to HM Revenue & Customs on my behalf.

① HM Revenue & Customs may impose fines where incomplete or false information is given.

Signed

K L Fabian

Date

please date 24/06/2022

Transfer to another plan (continued)

K L Fabian

Plan number: 3778951

Plan type: Income Release Plan

Transfer value as at 18 May 2022: £144,320.16

This includes the value of your ProfitShare account: £1,209.63

This transfer value is made up of crystallised and non-crystallised funds.

Your new pension provider, trustee or adviser should complete the remainder of this form

New provider / scheme / trustee information

Name	RC Administration Ltd
Address	1A Park Lane Poynton Cheshire
Postcode	SK12 1RD
Contact telephone number	0 3 3 0 3 1 1 0 8 3 9
Plan reference	Fabian Pension Scheme
Scheme type	SSAS (Small Self-Administered Scheme)
PSTR number	2 0 0 0 6 1 0 2 R H
QROPS ref	

① If the new plan is part of a large self-administered arrangement then any transfer value must be paid directly to the scheme trustees rather than the new provider. This section should be completed with the trustee's details.

① This is only required if the transfer is to an overseas pension scheme. We cannot complete a transfer to an overseas scheme which is not a Qualified Recognised Overseas Pension Scheme with HM Revenue & Customs.

New provider / scheme / trustee payment details

Name of bank	Metro Bank
Account name	Fabian Pension Scheme
Sort code	2 3 - 0 5 - 8 0
Account number	4 5 0 1 0 9 9 6
SWIFT Code	
BSB code	

The SWIFT code is only required if the transfer is to an overseas pension

The BSB code is only required if the transfer is to an Australian pension scheme.

Alternatively if you would prefer to receive a cheque please tick the following box.

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Transfer to another plan (continued)

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Declaration

New provider / scheme / trustee declaration

I declare that the information contained in this document has been completed fully and correctly.

I agree by signing this declaration that upon receipt of the transfer monies, the Royal London Mutual Insurance Society Limited is discharged from all further claims and liabilities arising in respect of the above plan, or that portion of the plan transferred where a partial transfer is effected.

The following declaration is also applicable, dependent upon the type of transfer being actioned ie UK transfer or overseas transfer.

Transfer within the UK

I confirm that the receiving scheme is, in accordance with Chapter 2 of the Finance Act, a registered pension scheme and the PSTR number has been completed on the previous page.

Overseas transfer

I confirm that the receiving scheme is a qualified and recognised overseas registered pension scheme and the QROPS number has been completed on the previous page. We understand that, where the transfer gives rise to the overseas tax of 25%, the tax payable will be deducted from the transfer value and sent to HM Revenue & Customs before the transfer is paid.

① This section applies to all parties that sign the declaration at the bottom of this page.

Signed



Date

24/06/2022

Print name

KIM FABIAN

On behalf of

Fabian Pension Scheme

(Name of scheme or new provider)

Dave's signature

Date: 24/06/2022

David Nicklin

Director

RC Administartion Ltd