



Transfer-out warranty

This form lets you transfer your Retiready Pension to another registered pension scheme.

This form has two parts:

Part 1 – Your Retiready Pension plan details. The Retiready Pension planholder should fully complete this section, sign it, then send the whole form to the pension scheme that the transfer is being made to.

Part 2 – The receiving scheme should fully complete this section and return the form to:
Aegon Digital Solutions, Sunderland SR43 4DL.

Please complete this form in BLOCK CAPITALS and ballpoint pen.

Receiving guidance or advice on transferring to take retirement benefits

If you're transferring in order to take retirement benefits, please tick this box and complete the questions regarding Pension Wise and financial advice below. ☐

If you're not planning to take retirement benefits after transferring, please tick this box and go to Section 1. ☒

We think you should get financial advice or guidance before making any decisions regarding your pension savings, to help fully understand your options.

Pension Wise guidance

Due to the importance of receiving guidance, the government introduced regulations to highlight Pension Wise. Pension Wise is a free and impartial government service from www.moneyhelper.org.uk offering you guidance on your pension savings and the options available to you. The regulations recommend you take guidance from an independent pension specialist at Pension Wise and appointments are available by phone or face to face.

You can book online at moneyhelper.org.uk/pensionwise or call them on 0800 138 3944. Alternatively call us on 03456 100 072 (call charges will vary) and we'll book an appointment for you.

Advice

Before making any decisions about taking your pension benefits you should also get advice from a financial adviser. If you don't have a financial adviser, you can visit moneyhelper.org.uk/choosing-a-financial-adviser to find one.

The regulations require you, or your adviser if they're completing the form on your behalf, to confirm the following options before we can proceed with your transaction. If you plan to take guidance and/or advice you should do this before completing this form.

- Have you received guidance from Pension Wise relating to this transaction in the last 12 months?
☐ Yes ☒ No
- If you answered No above and don't want to use Pension Wise you need to opt-out, please tick the relevant option below.
☐ I've received financial advice related to this transaction within the last 12 months.
☒ I don't want guidance from Pension Wise.

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

Part 1 – Your Retiready Pension plan details

1. Your personal details

Retiready account number

2	0	8	6	2	8	5	4
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Title

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

Mr

Full forename(s)

A	n	d	r	e	w										
---	---	---	---	---	---	--	--	--	--	--	--	--	--	--	--

Surname

J	a	n	n	e	t	t	a								
---	---	---	---	---	---	---	---	--	--	--	--	--	--	--	--

Date of birth (dd/mm/yyyy)

1	4		1	0		1	9	8	3
---	---	--	---	---	--	---	---	---	---

National Insurance number

J	S	2	8	4	2	9	1	D
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You should be able to find your National Insurance number on a payslip, from a P45 or P60, or a letter from HMRC.

Phone number

07736463668

Email address

andrew@hmfconsultancy.co.uk

We will only use your email address or phone number to contact you about your instruction.

2. Transfer details

Retiready Pension plan number

7	1	3	4	1	3	3	7
---	---	---	---	---	---	---	---

Current plan value*

£4,647.57

Date of valuation (dd/mm/yyyy)

2	9		0	8		2	0	2	3
---	---	--	---	---	--	---	---	---	---

I want you to make a:

(please choose one option)

☒ full transfer of the amount shown above.

☐ partial transfer of

£

*The plan value isn't guaranteed, so you could get back less than the amount you originally invested. If you ask for a full transfer, we'll transfer the full amount of the plan value on the date of transfer. If you ask for a partial transfer, we'll transfer the amount you have indicated, unless the plan value is lower than that amount. In that case, we'll transfer the full plan value.

3. Retiready Pension (Aegon Self Invested Personal Pension Scheme) details

Pension Scheme Tax Reference
(PSTR) number

00773956RC

This payment comes from a scheme registered under Chapter 2 of Part 4 of the Finance Act 2004.

4. Planholder declaration

I request that Retiready pay the value of the benefits detailed in Section 2 to the receiving scheme indicated in Section 6.

I confirm that this payment represents a full discharge of the benefits indicated and Retiready will have no further liability or obligation in respect of the transferred investments.

I confirm that I have read the enclosed pension scams leaflet from The Pensions Regulator.

Date (dd/mm/yyyy)

3 0 0 8 2 0 2 3

Planholder signature

x  x

Part 2 – Receiving scheme

For receiving scheme use only.

If you're registered as an Origo provider please submit your transfer request to Aegon Platform (Aegon Retirement Choices, Retiready, and One Retirement) using this facility.

If you're not registered as an Origo provider then please complete sections 5 and 6 below and return the full warranty to us.

5. Payment details

Payments will only be made to the trustees/provider of the receiving scheme.

Name of pension scheme

HMF Investment Trust SSAS

Address of pension scheme

RC Administration Limited

1A Park Lane

Pynton

Cheshire

Postcode

S K 1 2 1 R D

Bank account name

HMF Investment Trust SSAS

Bank account name and address

Metro Bank,

One Southampton Row

London

Postcode

W C 1 B 5 H A

Sort code

2 3 - 0 5 - 8 0

Account number

4 9 1 6 0 9 6 8

Payment reference

PTI-Andrew Jannetta

Payments will only be made by BACS.

6. Receiving scheme declaration

Please note that we require a copy of your PSTR Certificate.

Member's name

Andrew Jannetta

Name of scheme

HMF Investment Trust SSAS

National Insurance number

JS284291D

Plan number if known

N/A

I/We confirm that the receiving scheme is a UK pension scheme registered with HM Revenue & Customs (HMRC) under Chapter 2 of Part 4 of the Finance Act 2004. The HMRC reference is:

SF

PSTR

20007650RM

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. I/We confirm that the information given is accurate to the best of my/our knowledge and belief.

Date (dd/mm/yyyy)

3 0 0 8 2 0 2 3

Company stamp

Print name

Lisa Wetlon

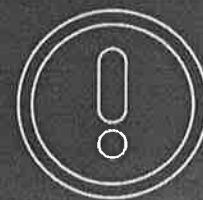
Position

Administrator

Signed for and on behalf of the receiving scheme

X *Lisa Wetlon* X

Don't let a scammer enjoy your retirement



Find out how pension scams work, how to avoid them and what to do if you suspect a scam.



Scammers can be articulate and financially knowledgeable, with credible websites, testimonials and materials that are hard to distinguish from the real thing.

Scammers design attractive offers to persuade you to transfer your pension pot to them or to release funds from it. It is then invested in unusual and high-risk investments like overseas property, renewable energy bonds, forestry, storage units, or simply stolen outright.

Scam tactics include:



- contact out of the blue



- promises of high / guaranteed returns



- free pension reviews



- access to your pension before age 55



- pressure to act quickly

If you suspect a scam, report it

- Report to the Financial Conduct Authority (FCA)

by contacting their Consumer Helpline on 0800 111 6768 or using the reporting form at www.fca.org.uk

- Report to Action Fraud

on 0300 123 2040 or at www.actionfraud.police.uk

- If you're in the middle of a transfer, contact your provider immediately and then get in touch with The Pensions Advisory Service (TPAS) at www.thepensionsadvisoryservice.org.uk

www.fca.org.uk/scamsmart

Four simple steps to protect yourself from pension scams

Reject unexpected offers

1

If you're contacted out of the blue about your pension, chances are it's high risk or a scam. Be wary of free pension review offers. A free offer out of the blue from a company you have not dealt with before is probably a scam. Fortunately, research shows that 95% of unexpected pension offers are rejected.*

Check who you're dealing with

2

Check the Financial Services Register (www.register.fca.org.uk) to make sure that anyone offering you advice or other financial services is FCA-authorised.

If you don't use an FCA-authorised firm, you also won't have access to the Financial Ombudsman Service or the Financial Services Compensation Scheme. So you're unlikely to get your money back if things go wrong. If the firm is on the FCA Register, you should call the Consumer Helpline on 0800 111 6768 to check the firm is permitted to give pension advice.

Beware of fraudsters pretending to be from a firm authorised by the FCA, as it could be what we call a 'clone firm'. Use the contact details provided on the FCA Register, not the details they give you.

3

Don't be rushed or pressured

Take your time to make all the checks you need – even if this means turning down an 'amazing deal'. Be wary of promised returns that sound too good to be true and don't be rushed or pressured into making a decision.

4

Get impartial information and advice

The Pensions Advisory Service (www.thepensionsadvisoryservice.org.uk) – Provides free independent and impartial information and guidance.

Pension Wise (www.pensionwise.gov.uk) – If you're over 50 and have a defined contribution (DC) pension, Pension Wise offers pre-booked appointments to talk through your retirement options.

Financial advisers – It's important you make the best decision for your own personal circumstances, so you should seriously consider using the services of a financial adviser. If you do opt for an adviser, be sure to use one that is regulated by the FCA and never take investment advice from the company that contacted you or an adviser they suggest, as this may be part of the scam.

Be ScamSmart with your pension. Check who you are dealing with.

www.fca.org.uk/scamsmart

*FCA Financial Lives

