

Transfer out scheme authority form

| | |
|---------------------|--|
| Name of the member: | |
| Reference number: | |

On behalf of the Trustees or scheme administrator of the following arrangement, we give you permission to ask HM revenue & Customs for any information about the arrangement's registration status.

| | |
|---|--|
| Name of arrangement: | |
| Address and postcode: | |
| Pension scheme tax reference (PSTR/QROPS) number: | |
| Employer contracting-out number: | |
| Scheme contracting-out number: | |

Signature: 

Date: 1.8.2018

Print Name: Jarquell Jones

Please return the filled-in form to: Park View Administration Ltd
Oak House
317 Golden Hill Lane
Leyland
Lancashire
PR25 2YJ
0330 053 9150

Transfer Agreement / Discharge Forms

| | |
|---------------------------------|-----------------------|
| Name of the transferring scheme | |
| Name of the member | JACQUELINE RUTH JONES |
| Reference number | |
| Date of birth | 12.12.65 |
| Guaranteed transfer value | |
| Guarantee end date | |

Transfer of all of the transfer value to:

Name of the receiving scheme: _____

PSTR Reference No: _____

Type of scheme: Occupational / SIPP / Overseas Pension / Personal Pension / Other (please state)

**delete as appropriate*

To be filled in by the administrator of the receiving scheme

Is the receiving scheme currently contracted out? Yes ☐ No ☐

If yes, please complete the box below.

| | |
|---|--|
| Employer's contracted-out number | |
| Scheme's contracted-out number | |
| Date contracted-out employment began | |
| How any Guaranteed Minimum Pension will be revalued | |

We will transfer the payment directly to the receiving scheme's bank account. Please fill in the section below.

Bank Account:

| | |
|----------------------|--|
| Name of Bank: | |
| Name on the Account: | |
| Bank Address: | |
| Postcode: | |
| Account No: | |
| Sort Code: | |

Guarantee

We confirm to the Trustee of the transferring scheme that:

- The receiving occupational pension scheme is registered under Chapter 2 of 4 of the Finance Act 2004
- The member is a member of the receiving scheme and the sums transferred will be held in connection with that member.

Signature for and on behalf of the administrator of the receiving scheme:

Print name:

Title:

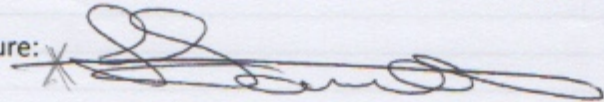
Date:

To be filled in by the member

Please pay all of my cash equivalent under the transferring scheme as a transfer value to the pension plan named on the first page.

- I confirm that I have been accepted as a member of the receiving scheme.
- I confirm that the administrator of the receiving scheme has agreed to accept the transfer and I have received a statement showing the benefits to be awarded in respect of the transfer payment.
- I accept that the benefits to be provided by the receiving scheme may be in a different form and of a different amount to those which would have been payable by the transferring scheme.
- I understand that the payment will be instead of the benefits due, or benefits that would have been due to me or for me as a result of me being a member of the transferring Scheme.
- I have not been given any advice by the Scheme or the Trustee about whether or not I should make this request and have had the opportunity to take independent financial advice related to this request.
- I understand that the Trustees and the Scheme will not consider whether or not the transfer that I have requested is in my interest and will not consider the interests of any of my relatives or dependants.
- I acknowledge that, in complying with my request, the Trustee and sponsoring employer(s) will be discharged of all liability to provide benefits to me in respect of the transfer value.
- I understand that there is no statutory requirement on the receiving scheme to provide for survivors benefits out of the transfer payment.
- I will protect the Trustees against any costs, claims, demands or expenses which may become due as a result of the payment.

I confirm that my date of birth shown on the first page is correct.

Signature: 

Date: 1.8.2018

Print Name: Jacqueline Jones