

Do you require Aviva to continue considering your transfer request?

Please choose one option, sign and date below and ensure you have provided all documentation required

No. I have reviewed my request and do not want to proceed any further.	
Yes. I would like you to continue to consider the transfer request and have completed the questionnaire to the best of my knowledge. I understand Aviva may require more information in order to consider my request further.	
Signature	Print name
	Date
<i>Please provide a daytime telephone number or email address so we can contact you if we have any further questions</i>	Contact details

The Pension Regulator

Have you read The Pensions Regulator's leaflet on Pension Scams?
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Plan Number:

Office use: TVO

Financial advice

What financial advice have you received in connection with your transfer request?

Who gave you this advice? Please provide full name of individual, Firm and address.

By giving us these details you agree Aviva can discuss the advice given with the adviser

Additional documentation required

Please provide a copy of the advice you have received in relation to your Aviva plan as we'll need to check what level of advice has been provided.

Plan Number:

Office use: TVO

Reason for transfer

What are the reasons for wanting to transfer your pension?
How were you originally contacted and by whom?
How did you first become aware of the Scheme?
Please give details of any cashback, loan or other cash benefit you have been offered?
Have you been told anything about accessing any part of your pension fund before age 55 other than through ill health?
What checks have you made into the full range of investments available under your Aviva plan?

Plan Number:

Office use: TVO

What have you been told will happen in the event of your death under your current pension? What do you understand would be payable to your estate or your relatives?

The transfer process

Were you encouraged to make a decision about the transfer quickly or without having time to make additional checks on the parties involved?

How did the receiving scheme (or any involved parties) arrange to deliver documentation or collect documents from you – for example a courier?

Were you given enough time to read and understand all the documentation you have signed?

The receiving scheme

What type of pension is the receiving scheme?

Additional documentation required

Please provide copies of the promotional material or information you have received about the Scheme Administrator/Practitioner.

Plan Number:

Office use: TVO

Charges

Please provide a copy of the Charges Schedule.

☐

Enclosed

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Not enclosed

If the Schedule cannot be provided please answer questions below

Please provide details of all charges applicable to your pension fund on transfer. Please include details of any payments to be made to an adviser or introducing agent.

Please provide detail of all ongoing charges to be applied to your pension fund under the Scheme.

Please provide details of any additional charges which will be applied dependent on your investment choice.

Have you been told you will incur fees if you cancel your transfer?

Plan Number:

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PRIVATE AND CONFIDENTIAL

Your investment options

Please give details of all investments you have been offered under the Scheme.

Please give details of any particular or guaranteed rate of return have you been promised

See leaflet published by The Pensions Regulator for examples

How is the rate of return to be guaranteed?

Additional documentation required

Please provide copies of the promotional material or information you have received about the investments available within the Scheme.

What do you understand about the process of releasing funds from property investments on a transfer out of the receiving scheme, taking retirement benefits or on death?

Plan Number:

Office use: TVO

Please give details of all other transfers you intend to make, or have made to this Scheme including approximate transfer values.

<i>Scheme transferred from:</i>	<i>Date of transfer</i>	<i>Transfer value</i>
		£
		£
		£
		£

Plan Number:

Office use: TVO