

Below are the two options available. Please tick one box to confirm what option you have chosen.

☒ Move to another provider without taking any tax free cash*

☐ Move my pension funds to another provider and Scottish Friendly to pay my tax free cash*
(please insert your bank details on the personal details page so we can pay you your tax free cash allowance.

I enclose my original Policy Document



I have lost my original policy document. I confirm that I am the legal owner of the policy stated above but that I no longer hold the original policy document and will provide proof of identification when submitting this form.

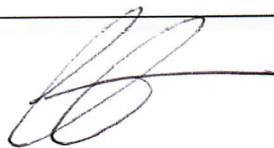


Please refer to the attached acceptable list of identification that we can accept.

The Scottish Friendly Assurance Society Personal Pension Plan has been approved as a personal pension scheme for the purposes of Chapter IV Part XIV of the Income and Corporation Taxes Act 1988.

Reference No.: SF87/118/1

Signature



Date

25 NOV 2020

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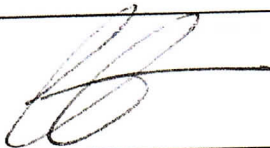


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Receiving scheme details

Before we proceed with the transfer we require the new receiving scheme to confirm in writing that they will accept your funds. They must supply their Bank details and unique Pension Scheme Tax Reference (PSTR). Please ask them to provide this. Your transfer will not be processed until these details are received. Please ask for the following to be completed in and returned.

Full name of receiving Scheme:.....

.....

Full Address of receiving Scheme.....

.....

Pension Scheme Tax Reference of receiving scheme.....

Bank details of receiving scheme:

Account name.....

Sort Code.....

Account Number.....

Payment reference.....

To be completed by the receiving scheme:

I can confirm that we accept the transfer of policy(s)

.....

Signature

Date.....

Head office Scottish Friendly House, 16 Blythswood Square, Glasgow G2 4HJ

Telephone 0333 323 5433 www.scottishfriendly.co.uk

The Scottish Friendly Marketing Group consists of the following companies:

Scottish Friendly Assurance Society Limited – Life, Savings and Investments. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Member of AFM, Member of ABI.

Scottish Friendly Asset Managers Limited – OEIC Managers, ISA Managers. Authorised and regulated by the Financial Conduct Authority.

The Investment Association. Registered in Scotland No 187215. **Scottish Friendly Insurance Services Limited** – Authorised and regulated by the Financial Conduct Authority. Registered in Scotland No 113007. **SFIS (Nominees) Limited** – Registered in Scotland No 397351.

Personal Details

Tick (please tick one)

Mr

☐

Ms

☐

Other

☐

Mrs

☐

Dr

☐

Forename

Surname

Policy Number(s)

National Insurance Number

Date of Birth

Address

Postcode

Email Address

Contact Number

Bank Details: Name of Bank:.....

Sortcode:

Account No:

Account Name:.....