

Member transfer out request form

Please complete this form as fully as possible. Incomplete forms will cause delays in processing the transfer requested.

Personal details

Member name	Mr John Andrew Inglis	SIPP Number	M0004087
NI number	WE 11 65 26 B	Member date of birth	04/03/1959

Receiving scheme type

A registered pension scheme under Part 4 of the Finance Act 2004	
A recognised overseas pension scheme as defined by HMRC under Part 4 of the Finance Act 2004	
An employer financed retirement scheme as defined by HMRC under Part 4 of the Finance Act 2004 (provide details)	

Receiving scheme details

Receiving scheme name	
Receiving scheme policy number	
Receiving scheme address	
Telephone number	
Contact name/department	
PSTR number	

Please confirm how the existing investments are to be dealt with

Please sell all of my investments prior to transfer	
Please transfer all my investments in specie*	
Please sell the investments listed below when this instruction is received and transfer the remaining investments in specie*	

Please note that an in specie transfer of assets can be a complex process involving several parties and may take some time to complete.

Further documentation may be required to facilitate the sale of investments or in-specie transfers.

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1. The purpose of this document is to provide information regarding the status of the project.

2. The project is currently in the planning stage and is expected to be completed by the end of the year.

3. The project is being managed by the Project Manager and is being supported by the Project Team.

4. The project is being funded by the Department of Defense and is being managed by the Project Manager.

5. The project is being managed by the Project Manager and is being supported by the Project Team.

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Investments to be sold prior to transfer

Name of investment provider	Fund name	Policy/plan number	Amount in £ sterling or %
N/A	N/A	N/A	N/A

Commercial property

If you hold a commercial property investment, is this to be sold prior to transfer?	Yes*	
	No	

*If yes, we will issue a Property Sale Information Schedule for the Trustee(s) completion and return upon receipt of this form.

Please note if a property is being transferred in specie, Rowanmoor Personal Pensions Limited will not commence the transfer of the other investments or cash until the property has been transferred.

Please provide details of the solicitor who will be acting on behalf of the SIPP to process the property transfer:

Contact name			
Company name			
Address			
Telephone		Email address	

Payment of income withdrawal

We will continue to pay your benefits from the SIPP until the final asset is transferred to your new provider unless you advise to the contrary.

Please use this box to provide any amended instructions:

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An unauthorised payment may occur if the receiving scheme provides you with benefits other than in accordance with UK pension legislation, or involves inducements to transfer for example, in the form of cash, assets, additional rights or benefits in kind. HMRC may charge you tax of up to 55% on unauthorised payments and the transferring scheme tax of up to 40%. If you are in any doubt about whether the transfer is an unauthorised payment, please seek advice from a suitably qualified financial adviser.

Member Declaration

- I request and consent to the transfer set out in this form.
- I confirm that the purpose of the transfer is to provide me with relevant pension benefits under the receiving pension scheme and that neither I nor anyone connected with me will derive any other benefit, whether directly or indirectly from the pension fund, as a result of the transfer taking place.
- I am not aware of any reasons for the transfer to be considered an unauthorised payment under the Finance Act 2004.
- By signing this declaration, Rowanmoor Personal Pensions Limited is authorised to release details about the transfer from my SIPP and the subsequent application of benefits to the receiving scheme.
- The payment I have requested discharges Rowanmoor Personal Pensions Limited and Rowanmoor Trustees Limited liability in respect of the transferred funds.
- I understand that in the interest of preventing pension liberation fraud further checks may be made by Rowanmoor Group plc's Technical Team, who may be in contact to request further details of the proposed transfer

I have taken advice from a suitably qualified Financial Adviser with regard to this transfer and have considered the impact on any protection I may have	<input checked="" type="checkbox"/>
I have not taken advice from a suitably qualified Financial Adviser with regard to this transfer and have considered the impact on any protection I may have and wish to proceed without advice	<input type="checkbox"/>

Signed	<i>Ja. Inglis</i>	Date	
Print Name	JOHN ANDREW INGLIS		

Receiving scheme declaration form

Member name	Mr John Andrew Inglis	Member date of birth	04/03/1959
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Receiving scheme details

Member name	
Your plan reference	
Name of scheme	
PSTR number	
Name of administrator/operator	
Name of Trustee(s)	
Address for correspondence	
Contact Name	
Email address	

As the Administrator/Operator of the scheme (please tick the statement that applies):

We confirm that our Scheme is a registered pension scheme accepted under Chapter 4 of the Finance Act 2004 ¹	<input checked="" type="checkbox"/>
A qualifying recognised overseas pension scheme (QROPS) as defined by HMRC under Chapter 4 of the Finance Act 2004 and has satisfied HMRC requirements in this respect ²	<input type="checkbox"/>

¹ If the receiving scheme is a registered pension scheme please provide a copy of the HMRC Registration Certificate.

² If the receiving scheme is a QROPS please enclose a copy of the letter from HMRC confirming the recognised status of this scheme.

Transfer Payment Details

Cheque

Made payable to	
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Electronic payment

Account name	
Sort code	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Account number	<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"/>
Payment reference	
Bank name and address	

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In specie transfer details (if applicable)

Has the member applied for an in specie transfer?	Yes	No
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If yes, complete the relevant sections of this form to provide the in-specie transfer details. Rowanmoor Personal Pensions Limited will ensure that all in specie assets have been transferred before making any cash payments to the new scheme.

If no, move on to the receiving scheme declaration on page 3.

Please provide full details of all assets to be transferred in-specie below, including name of investment and policy/plan numbers where appropriate and contact details. Please see page 3 if the transfer includes commercial property.

Name of Asset	Details

Investment manager accounts

If an investment manager account has been detailed above, please confirm the following:

We will be establishing a new account with the same Investment Manager	
These investments are to be transferred directly to a new Investment Manager account	

Contact details for transfer:

Name	
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Address	
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Telephone	
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Email	
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Portfolio reference	
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Commercial Property

If the member has a commercial property, please provide details of the solicitor you as the receiving scheme will be using to process the transfer.

Contact name			
Company name			
Address			
Telephone		Email	

Receiving scheme declaration

- We confirm that the sums or assets which are the subject of the transfer are being transferred so as to become held for the purposes of, or to represent rights under, another pension scheme in accordance with section 169 of Finance Act 2004 in order to provide relevant pension benefits.
- We confirm the above statement is true and that upon receipt and acceptance of the transfer value it will be applied to provide benefits for or in respect of the member under the receiving scheme and that the member nor anyone connected with the member will derive no other benefit whether directly or indirectly from the pension fund other than authorised payments, as defined in section 164 of Finance Act 2004, from the receiving scheme.
- We give our permission to HMRC to provide the transferring scheme with information about the registration status of the receiving scheme.
- We understand that in the interest of preventing pension liberation fraud further checks may be made by Rowanmoor Group Plc's Technical Team, who may be in contact to request further details of the proposed transfer.

Signed	
Print name	
Position	
Company	
Date	

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MEMORANDUM FOR THE RECORD

DATE: 10/10/1964

SUBJECT: [Illegible]

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