

# Your Personal Pension Scheme Transfer Declaration



## Guidance Notes

The member should complete section 1 only. Section 2 will be completed by the receiving scheme.

### 1 Member details

Please write clearly  
in the white spaces  
with capital letters or  
tick the boxes

Your Title Mr ☒ Mrs ☒ Miss ☐ Ms ☐ Other title ☐

Your last name

INGLIS

Your first name(s)

VALERIE

Your daytime contact number

01479 231127

Policy number(s) to be transferred to new arrangement

611569688

Name of Company receiving arrangement

Address of Company receiving arrangement

### 2 Receiving Scheme details

The receiving scheme must complete either Section 2.1 or 2.2 and Section 3.

#### 2.1 Occupational Pension Schemes (including transfers to AVC Schemes)

The Receiving Arrangement is a Registered Pension Scheme, as defined in part 4 of the Finance Act 2004 under Pension Scheme Tax Reference (PSTR) number:

If protected rights are to be transferred is the scheme one to which a transfer payment may be made in accordance with Protected Rights (Transfer Payments) Regulations?

Yes ☒ No ☐

If protected rights are to be transferred is the member's employment within the receiving arrangement contracted-out?

Yes ☒ No ☐

Date member joined pensionable employment

Is the receiving arrangement a small self administered scheme (SSAS)?

Yes ☒ No ☐

What Inland Revenue regime applies to the member within the receiving scheme?

Before 1987 ☒

1987 to 1989 ☒

After 1989 ☒

The cheque for the transfer value will be paid into an account in the name of the Trustees or Managers of the receiving arrangement and should be drawn in the favour of:

## 2 Receiving Scheme details

### Personal Pension Schemes

The Receiving Arrangement is approved under Chapter IV, Part XIV of the Income and Corporation Taxes Act 1988 under PSO approval number:

If protected rights are to be transferred, they will be treated in accordance with DSS regulations.

The appropriate personal pension scheme is not approved to receive minimum contributions only from the Department of Social Security.

The cheque for the transfer value will be paid into an account in the name of Trustees or Managers of the receiving arrangement and should be drawn in favour of:

## 3 All Receiving Schemes

We confirm that:

- \* the above statements are true and complete:
- \* our scheme is not a contracted-in scheme that was formerly contracted-out

We agree to accept the transfer value from Scottish Widows plc.

We confirm that the following requirements are attached / will follow in order for Scottish Widows plc to process this transfer:

- \* the member's policy schedules in respect of each policy being transferred.
- \* a fully completed statutory declaration in respect of each policy where the policy has been mislaid;
- \* a fully completed DSS form where protected rights are being transferred.

Name

Title

Signature

Date

For and behalf of the receiving arrangement