

SIPP cash transfer form

This form is your authority to transfer benefits from another registered pension scheme into an AJ Bell Investcentre SIPP via a cash payment. If you would like to transfer benefits in specie, please use the SIPP in specie transfer form. Both forms may also be used for a Junior SIPP. All transfer forms are supplementary to your application form.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 83 99 060 or email us at enquiry@investcentre.co.uk.

You must complete all of the details requested on the following page and sign the declaration. Once completed, please return the form to **AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE.**

To be completed by the transferring client

Personal information

Full name of client	
Date of birth	Your SIPP reference (if known) SCC
National Insurance Number	
Permanent residential address	
Country	Postcode

Transferring scheme details

Full name of transferring pension scheme (if known) NOEL VILLAGE (STEEL FOUNDER) LTD RBS SSAS	
Policy number N/A	
Pension Scheme Tax Reference (PSTR) 00417995RA	
Name and address of administrator of transferring scheme PENSION PRACTITIONER, 48 CHORLEY	
NEW ROAD, BOLTON	
	Postcode BL1 4AP
Telephone number of transferring scheme 0800 634 4862	
Approximate fund value to be paid to the receiving scheme £ TO BE CONFIRMED	
Is the transferring scheme a final salary pension scheme?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
This is a full transfer. <input checked="" type="checkbox"/>	This is a partial transfer. <input type="checkbox"/>
If partial, please enter the total fund value £	

Drawdown details

Please tick **one** of the following three options in respect of the funds being transferred. The funds are:

☐

1. not in drawdown

☒

2. already entirely in drawdown

☐

3. already partially in drawdown

Please confirm the approximate split as follows:

Crystallised £

Uncrystallised £

If the transfer is in drawdown you must also complete our SIPP transfer in drawdown benefit form.

Request for transfer

I authorise and instruct you to transfer funds from the plan as listed in this form directly to the receiving scheme in the form of a cash payment made by cheque, or such other method agreed with AJ Bell Investcentre.

Where you have asked me to give you any original policy documents in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer listed in this form.

I authorise you to release all necessary information to AJ Bell Investcentre to enable the transfer of funds to the receiving scheme. I agree that a copy of this authority should have the validity of the original.

I authorise you to obtain from, and release to, the financial adviser any additional information that may be required to enable the transfer of funds.

If an employer is paying contributions to any of the plans as listed in this form, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan.

Until this application is accepted and complete, the receiving scheme administrator's responsibility is limited to the return of the total payment to the current plan.

Where the payment made to the receiving scheme represents all of the funds under the plan listed in this form, then payment made as requested will discharge the current provider of all claims and responsibilities in respect of the plan listed.

Where the payment made to the receiving scheme represents part of the funds under the plan listed in this form, then the current provider will be discharged of all claims and responsibilities only in respect of the part of the plan represented by the payment.

I promise to accept responsibility in respect of any claims, losses and expenses that AJ Bell Investcentre and the current provider may incur as a result of any incorrect information provided by me in this application, or of any failure on my part to comply with any aspect of this application.

I apply to the scheme administrator of the receiving scheme to accept the transfer from the transferring scheme and to pay it into my SIPP. I confirm that the information provided relevant to my application to transfer benefits into my SIPP is correct and complete, to the best of my knowledge and belief.

I confirm that adviser charges must be paid in accordance with the adviser charges option selected previously.

I confirm that my adviser has provided me with sufficient information for me to understand the effect that this transfer will have on my SIPP.

I confirm that I have not received any advice or recommendation in relation to the transfer from AJ Bell Investcentre.

Additional declaration for transfers of income drawdown (if applicable)

I declare that all, or a part, of the transfer payment has been designated to provide income drawdown pension benefits for me under the transferring scheme. I understand that the transferring scheme is responsible for confirming the amount (if any) designated to provide these benefits.

I further understand that the amount of the transfer payment representing these benefits will be applied to provide me with income drawdown benefits under the receiving scheme and will be subject to the same maximum income limit (if any) as under the transferring scheme, until such time as a further review of this limit is triggered.

Signed (client's signature)

Date

If the transfer is into a Junior SIPP, the client cannot sign this form. The parent/guardian must sign it.

Parent/guardian's name

Date

Parent/guardian's signature

Transferring scheme instructions

If you require any further forms to be completed by the transferring client, please contact the client or their financial adviser directly.

Your cheque must be made payable to 'AJ Bell Investcentre SIPP re (insert name of transferring client)' and sent to the address shown above. If you would like to pay by electronic transfer, please contact us on 0345 83 99 060 or email us at enquiry@investcentre.co.uk for bank details.

For all transfers you must provide us with full details of the benefits being transferred. The information that you provide must confirm:

- that the transferring scheme is a registered pension scheme under Finance Act 2004
- the transferring scheme's HMRC pension scheme tax reference
- the total transfer value
- whether the transfer contains any crystallised benefits and, if so, full details of them
- whether you have reason to believe the transferring member has flexibly accessed their pension rights (whether in the transferring scheme or otherwise) and, if so, specify the date you believe the rights were first accessed
- whether any of the transfer value derives from a beneficiary's drawdown fund and, if so, whether it is a dependant's, nominee's or successor's drawdown fund, and if it is a dependant's drawdown whether the funds are in capped drawdown (and full details) or flexi-access drawdown
- details of any transitional protection relating to the benefits or the transferring member and, if relevant, whether the transfer is part of a block transfer
- whether the transfer value derives from a pension sharing order or provision, or whether an earmarking order is in force in relation to the transferring benefits

For all transfers you must also return this transfer authority form, or a copy of it, to us at the address shown above.