

Transfer request form

Personal Pension

Once you've completed this form, please return it to:
Legal & General Retirement
PO Box 809
Cardiff
CF24 0YL



We'll then contact your existing provider and begin the transfer process.
Your current provider may also ask you to complete some forms.

1 Your personal details

 Please complete this section in full.

1. What is your full name and title?	<input checked="" type="radio"/> Mr/Mrs/Miss/Ms/ <input type="radio"/> Other
	Surname
	First name(s)
2. What is your date of birth?	
3. What is your current permanent residential address including postcode and telephone number?	Address
	Postcode
	Home phone
	Mobile phone
	Email address
4. What is your National Insurance number?	
You must have a permanent National Insurance number.	

MR

COX

PAUL - AUSTIN

07041973

18 PIPERS CLOSE

ROYAL WOOTTON BASSETT

SWINDON, WILTS

SN4 7DP

07545107082

PAUL.COX73@GMAIL.COM

N2079595C

For example, AB 123456 C

2 About your pension pot

Please give details of the pension pot you'd like to transfer into drawdown. We can only accept Defined Contribution pensions (also known as Money Purchase) with a value of at least £1,000.

Who is the current pension provider?

RF SCHEME LTD

What is the existing plan number?

00810573 RZ

What is the estimated value?


£47,067.70

Pension provider email address

ADAM@CARLTONJAMES.CO.UK

Pension provider address

3 Declaration

 Please remember that it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

To my current provider(s)

I would like to transfer my pension listed in Part 2 of this application.

I authorise Legal & General, my current provider and any financial adviser/intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of funds to Legal & General.

I accept that in order to comply with regulatory obligations, Legal & General and my current provider(s) named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.

I authorise and instruct you to transfer the funds from the plan/arrangements(s) as listed in Part 2 of this application directly to Legal & General, and to provide any instruction and/or discharge required by any relevant third party to do so.

Until this transfer is accepted and complete, Legal & General's responsibility is limited to the return of the total payment(s) to my current provider(s).

When payment is made to Legal & General as instructed, this means I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in Part 2 of this application where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.

Where you have asked me to give you the original policy document(s) in return for the transfer of pension pot(s) and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan.

To my current provider(s) and Legal & General

I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Legal & General and my current provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application.

I authorise and instruct you to transfer funds from the plan(s) as listed in Part 2 directly to Legal & General, and to provide any instruction and/or discharge required by any relevant third party to do so:

- 1 Sell your Pension assets as detailed (not being less than £100) and/or
- 2 Transfer the cash realised to the new Pension manager, which will be: Legal & General (Portfolio Management Services) Limited, One Coleman Street, London, EC2R 5AA. Ref: PSTR 00714474RE.
- 3 To provide Legal & General (Portfolio Management Services) Limited with the information, written or non-written, concerning the Pension and to accept any instructions from them relating to the Pension being transferred.

SIGNATURES

Please sign, date and return to us at the address on the front page.

To be completed in all cases

Applicant

I agree to the terms set out in the 'Declaration' and the use of my information as described in the privacy policy.

Signature

Date



27062023