

# Form T - Transfer Questionnaire and Declaration

*To be sent to and completed by the new pension provider.*

**WARNING - Failure to fully complete this form will delay payment.**

## Section 1 - Details of Transferring Scheme /Planholder

Scheme Name:

The Phoenix (RL) Personal Pension Scheme

Planholder Name:

Mr Stephen Hoole

Planholder date of birth:

08/07/1958

Planholder NI number:

YZ898578B

Plan number(s)

0302135271/001

## SECTION 2 - Details of Receiving Scheme

Scheme Name:

Sellec Pension Fund

Scheme's HMRC registration or tax approval reference:

00181421RG

**Please send us a copy of your tax approval letter or PSTR confirmation**

Scheme administrators name:

Stephen Hoole

Scheme administrators address:  
*Transfer Questionnaire And Declaration*

Address:

Flat 5, The Observatory  
402 Fulwood Road  
Sheffield S10 3GD

Postcode:

Name of Contact (in case of enquiry):-

Stephen Hoole

Telephone Number:

07743098374

**Type of scheme** - the scheme is a:  
(Please tick the **one** relevant box)

- a) UK registered personal or stakeholder pension scheme. ☐
- b) UK registered occupational pension scheme, or a buy-out (deferred annuity) contract or a public service pension scheme. ☒
- c) Another UK registered pension scheme. ☐  
Please provide full details of the scheme.

### Contracted out status

Is the scheme able to accept contracted out rights?

☒ Yes ☐ No

If 'Yes', the contracted out reference numbers are:

SCON S           N/A

and

ECON E           N/A

If Guaranteed Minimum Pension is to be provided, it will be revalued at:

%

### Additional details

On what basis do benefits accrue in the receiving scheme/arrangement?

Money Purchase ☒ Defined Benefit ☐

If you have ticked (a) or (b) above, is the scheme

Postcode:

(i) A self-administered scheme?

☒ Yes ☐ No

(ii) An insured scheme?

☐ Yes ☐ No

Also, if you have ticked (b) above, is the scheme

(iii) A public service pension scheme as defined in s150(3) FA2004?

☐ Yes ☐ No

(iv) A buy-out (deferred annuity) contract?

☐ Yes ☐ No

**If the scheme is an insured scheme, or a buy-out contract, we will usually make payment only to the life office insuring the scheme or contract.**

### SECTION 3 - Payee Details

a) Would you prefer payment to be made by BACS?

☒ Yes ☐ No

If 'Yes', please provide us with details of the account into which you would like payment to be made, printed on your company's headed paper, and we will consider payment by BACS.

b) If you require payment by cheque, to whom should the transfer cheque be made payable?

N/A

This Administrator ☐ Trustees ☐  
is the  
scheme /  
contract's: Insurer ☐

If you are neither the scheme's administrator nor trustees, and you are not the scheme's insurer, under what authority do you seek to receive the transfer payment?

c) Where should the cheque be sent?

Name:

Address:

### SECTION 4 -

#### Receiving Scheme Declaration

**This section is NOT to be completed by the planholder**

We hereby declare:

- a) We are willing to accept the transfer payment;
- b) The transfer payment will be used to provide relevant benefits under a UK registered pension scheme, in line with Part 4 of the Finance Act 2004;
- c) The information given in this questionnaire is complete and correct; and
- d) We hereby authorise HM Revenue & Customs to confirm our registered pension scheme status to Phoenix Life

Signed for and on behalf of the receiving scheme:

**Please note: Phoenix Life Limited will not accept the return of the payment should the transfer not proceed.**

Authorised signatory:

Name of signatory:

Stephen Hoole

Position/Title of signatory:

Scheme Trustee and Registered Administrator

Date signed: