

# Authorisation and request to transfer pension savings into The People's Pension



This form cannot be used to transfer savings from a Final Salary (DB) or CARE (career average) scheme. If you are considering a transfer from such a scheme you should seek guidance and advice.

## Your details

Forename(s) <input type="text" value="JOSEPH"/>	Date of birth <input type="text" value="30 / 09 / 1962"/>	National Insurance number <input type="text" value="NA477126B"/>
Surname <input type="text" value="BEARDWOOD"/>	Email <input type="text" value="joe.beardwood@me.com"/>	
Address <input type="text" value="Fron Heulog"/> <input type="text" value="Betws-y-coed"/> <input type="text"/>	Phone numbers Day <input type="text"/> Evening <input type="text"/> Mobile <input type="text" value="07816 819229"/>	
Postcode <input type="text" value="LL24 0BL"/>		

## Financial adviser details

Fill in this part if you have a financial adviser and you're happy for us to discuss or release information on the transfer of your funds

Company name <input type="text"/>	Address <input type="text"/> <input type="text"/> <input type="text"/>	
Contact name <input type="text"/>		
Email <input type="text"/>	Postcode <input type="text"/>	Contact number <input type="text"/>

## Transferring scheme details

This is the name and address of the company or scheme actually paying the transfer value over to The People's Pension Scheme.

NOTE: If you have more than one transferring scheme, please either photocopy this form prior to filling it in or contact us for a further form.

We'll use an electronic transfer system known as Origo to make your transfer as long as your other pension provider also uses this. This should reduce the time taken to make the transfer. If they don't use Origo, we'll process the transfer manually, and this means it may take a little longer.

Provider/Scheme name <input type="text" value="Sheridan Binnie Pension Scheme"/>	Address <input type="text" value="c/o Registered Scheme Administrator Ltd"/> <input type="text" value="Venture Wales Building, Merthyr Tydfil"/> <input type="text"/>	
Contact name (if known) <input type="text" value="Gavin McCloskey"/>		
Policy number(s) (if appropriate) <input type="text" value="PSTR: 00797006RS"/> <input type="text"/> <input type="text"/>	Postcode <input type="text" value="CD48 4DR"/>	Phone number <input type="text" value="0121 769 0041"/>
Total transfer value (if known) <input type="text" value="£ 234,505.73"/>		
Does this represent the full value of your benefits under the transferring scheme?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Are the sums and assets being transferred:
Are your benefits under the transferring scheme subject to any existing or proposed trustee in bankruptcy orders, or earmarking or pension sharing orders, or other receiving orders?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	(a) already entirely in drawdown (b) already partially in drawdown (c) not in drawdown?

Please note, we are unable to accept funds that have been partially/fully accessed (crystallised). Failure to disclose this will result in the funds being returned to your existing provider/ scheme.

## Your declaration

I authorise, instruct and apply to the provider ('current provider') listed in the transferring scheme section of this application to transfer sums and assets from the plan(s) as listed in that section ('my plan(s)') directly to The People's Pension and to provide any instructions and/or discharge required by any relevant third party to do so.

I authorise The People's Pension, the current provider, any contributing Employer and any financial adviser 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 sums and assets to The People's Pension.

Until this application is accepted and complete, The People's Pension's responsibility is limited to the return of the total payment(s) to the current provider.

When payment is made to The People's Pension as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of my plan(s) where the whole of my plan(s) is transferring, or that part of my plan(s) represented by the payment(s) if only part of my plan(s) is transferring.


I accept that in order to comply with regulatory obligations, The People's Pension and the current provider 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 accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that The People's Pension and the 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 have read and understood the attached explanatory notes 'Things to consider before you decide to transfer'. I have not asked for advice and I have not received advice from any representative of The People's Pension Trustee Limited or its agents.

Please sign and date below:

Signature



Date

D 20 M 04 Y 22

**Important:** Transferred funds will be paid into your chosen fund. If you have not chosen a fund the value will be paid into The People's Pension 'balanced' investment profile which is the default investment profile.

The People's Pension Scheme is an occupational pension arrangement, governed by The People's Pension Trustee Limited and administered by B&CE Financial Services Limited. The scheme is approved by HM Revenue and Customs (HMRC) as a Registered Pension Scheme under Chapter 2 Part 4 of the Finance Act 2004 (PSTR number 00785199RQ).

Please return to: [admintransfers@bandce.co.uk](mailto:admintransfers@bandce.co.uk) or Freepost The People's Pension

Also, please keep a copy of this completed form for your own records. We will confirm to you we've received it.

If you need additional forms you can download them from your Online Account. Log in or set up at [www.thepeoplespension.co.uk/manage-account](http://www.thepeoplespension.co.uk/manage-account).



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B & C E Financial Services Limited is authorised and regulated by the Financial Conduct Authority  
Ref: 122787. It acts as a distributor of, and an administrator for, pensions (including The People's Pension Scheme), accident and death insurance and a range of financial welfare products.

For people, not profit