

Your Personal Pension Scheme Transfer Declaration

Guidance Notes

The member should complete section 1 only. Sections 2 & 3 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 ELPHICK

Your first name(s) NATHAN

Your daytime contact number

Policy number(s) to be transferred to new arrangement Q72438W00

Q72438W10

Name of Company receiving arrangement

Address of Company receiving arrangement

Postcode

I request the Trustees of the Scottish Widows Personal Pension Scheme to pay a transfer value to the Trustees of the Scheme/Insurance Company named above. I understand that payment of this transfer value will discharge the Trustees of the Scottish Widows Personal Pension Scheme of all liability whatsoever.

Member's signature



Date 16.01.15

2 Receiving Scheme details

The receiving scheme must complete Section 2 and Section 3.

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

008183342X

OR

The Receiving Arrangement is a Qualifying Recognised Overseas Pension Scheme (QROPS)*, as defined in part 4 of the Finance Act 2004

☐ If this box is ticked we will send you further documents to enable this to proceed

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:

VERITY + BEVERLEY LIMITED
PENSION SCHEME

3 All Receiving Schemes

We confirm that:

The above statements are true and complete:

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

Name

Title

Signature

Date

For and behalf of the receiving arrangement