

Transfer form – new pension provider

Please make sure this form is filled in by **your new pension provider** using black ink and in BLOCK CAPITALS and send it back to us at this address: Aviva, PO Box 520, Norwich, NR1 3WG.

Aviva scheme details

Plan number

PP44122905

Plan holder name

Lisa Alkins

New pension provider details

Scheme / contract name

ESTHER SALMON

Scheme / contract number

Bank details for new provider

Bank

Account holder name

Account number

Sort code

BACS payment reference

Type of scheme – please tick one box only

☐

A registered personal pension
(including stakeholder) scheme

☒

Small self-administered schemes
(SSAS)

☐

Self-invested personal pension
(SIPP)

☐

Occupational defined contribution

☐

Occupational defined benefit

For any of these schemes please fill in section 1 **and** section 3

☐

Overseas scheme
Please contact us for an overseas
transfer quote on 0800 068 6800

☐

Any other type of scheme
Please fill in section 2 **and** section 3

Transfer form – new pension provider

Section 1

New pension provider HMRC registration /
approval reference number

Date approved

Name and address of new provider

Please enclose a copy of your HMRC registration / approval letter

Section 2

Type of scheme

Receiving scheme approved by tax authority

Tax authority reference number

Please enclose a copy of your HMRC registration / approval letter

Section 3 – Declaration of new pension provider

Please sign the declaration below:

I confirm the above statements are true. When we receive and accept the transfer request we'll use it to provide benefits for, or in relation to, the member of the scheme. This is in accordance with the appropriate regulations made under the Finance Act 2004.

Signed

Position

Signing for and on behalf of
the trustees / administrators of

Date

27/9/21

Hi Esther

Apologies for quick note.

Have enclosed the discharge form for AIVIA.

It seems as though the signature is required from someone @ Retirement Capital.

Can you please finish the form off.

Naturally, let us know if we have misunderstood the form.

Many thanks

Paul Allis

PLC Estates Pension Scheme