



Transfer Details Information Form

A form is required for each plan that you are looking to transfer in, if you are transferring into a new plan an Application for Membership is required in addition.
The GM Self-Invested Personal Pension Scheme is able to accept Protected Rights.

Personal Information

| | |
|-------------------------------|--|
| Surname | Date of Birth |
| Forenames | Marital Status |
| Title | NI Number |
| Permanent Residential Address | Previous Address (If you have moved in the last two years) |

Transfer Details

Please provide as much information as possible

| | | | |
|-------------------------------|------|-----------|------|
| Scheme Name | | | |
| Scheme Administrator | | | |
| Scheme Administrator Address | | | |
| Policy Number | | | |
| PSTR Number | | | |
| Transfer Value | £ | | |
| Protected Rights Value | £ | | |
| Source of Transfer | | | |
| How will the Transfer be made | Cash | In Specie | Both |

If the transfer is being made in specie please complete the following information:

| | | | |
|---------------------------|--|--|--|
| Where are the assets held | | | |
| Contact Name | | | |
| Address | | | |
| Telephone Number | | | |
| Reference | | | |

I attach a list of the assets which are being transferred.

| Benefits in Payment | |
|---|-------------|
| Have you crystallised (commenced drawing benefits) any of the fund? | Yes / No |
| If the answer is yes please answer the following questions: | |
| How much of the fund has been crystallised? | % |
| Date the fund was crystallised? | |
| Maximum Income that can be taken from the Crystallised Fund | £ |
| Important Note: | |
| Under HMRC legislation it is not possible to transfer any part of a scheme which has been crystallised into an un-crystallised fund. Any part of the scheme being transferred which has been crystallised must be transferred into a new arrangement set up specifically for receiving the crystallised transfer. | |
| Bulk Transfers | |
| Is this part of a block transfer? (Where you and at least one other person are transferring your rights under the transferring scheme at the same time) | Yes / No |
| If the answer is yes please answer the following questions: | |
| Were you entitled to a lump sum in excess of 25% on the fund value from the transferring scheme? | Yes / No |
| Normal retirement age under the transferring scheme | |
| Declarations and Signature | |
| <ol style="list-style-type: none"> 1. I agree that this transfer shall form part of my plan, the terms and conditions of which I have received and agreed to. 2. I declare that the statements made in all sections of this form are true and complete. 3. I hereby authorise the Scheme Administrator to obtain such details as may be required from any Trustee, Scheme Administrator in relation to any scheme arrangement or contract that I wish to transfer to the scheme. 4. I acknowledge that the funds will be held in the GM Self-Invested Personal Pension Scheme and will be eligible for investment in accordance with the terms applying to my plan. 5. I acknowledge if any part of the transferring scheme on this form has been crystallised, it cannot be transferred into my existing plan if it has already been funded, I accept that in this situation the crystallised part of the transferring scheme must be transferred into a separate plan specifically set up to receive the crystallised transfer and will be subject to the standard plan charges. | |
| Data Protection | |
| <ul style="list-style-type: none"> • I understand that the personal information I provide will be processed in accordance with the Data Protection Act 1998 • I understand that, if necessary, the Scheme Administrator will pass my details to regulatory authorities or other parties as may be required by law. | |
| Applicants Signature | Date |