



Smart Pension Ltd.  
40 Eastbourne Terrace  
Paddington  
London  
W2 6LG

Dear Sir/Madam

I hereby authorise Smart Pension, also known as the AutoEnrolment.co.uk Master Trust, to seek and obtain any information relating to my pension policies held with other pension schemes, with effect from the date of this letter and ongoing thereafter.

The AutoEnrolment.co.uk Master is authorised and regulated by the Pensions Regulator with PSR number 12011089 and HMRC PSTR number 00820230RM. The Trustees are EC2 Master Limited.

**Ceding Scheme Information:**

|   |   |
|---|---|
| Full Name of Ceding Scheme Name:  |   |
| Ceding Scheme Address:  |   |
| Full name of pension scheme where known (scheme type):  |   |
| Pension Policy/Membership Number:   |   |
| Approximate fund value:   |   |
| Does this represent the full value of the Ceding Scheme Policy?   | Yes/No (circle)                               |
| Is the Ceding Scheme subject to any existing or proposed bankruptcy orders, earmarking, pension sharing orders, other receiving orders. | Yes/No (circle) and provide relevant details. |

**Member Information:**

|                  |  |
|------------------|--|
| Full Name:       |  |
| Date of birth:   |  |
| Current Address: |  |

|   |  |
|---|--|
| Previous Address: (if moved since the policy was taken) |  |
| National Insurance Number:                              |  |
| Employer Name:  |  |

I authorise and instruct you to transfer sums and assets from the Pension Policy as listed in Ceding Scheme information directly to Smart Pension (AutoEnrolment.co.uk Master Trust) and to provide any instructions and/or discharge required by any relevant third party to do so.

I authorise Smart Pension (AutoEnrolment.co.uk Master Trust), Ceding Scheme and any financial intermediary 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 Smart Pension (AutoEnrolment.co.uk Master Trust).

I authorise Smart Pension (AutoEnrolment.co.uk Master Trust), Ceding Scheme and any employer paying contributions to any of the plan's as listed in Ceding Scheme Information 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 Smart Pension (AutoEnrolment.co.uk Master Trust).

Until this application is accepted and complete, Smart Pension (AutoEnrolment.co.uk Master Trust)'s responsibility is limited to the return of the total payment(s) to Ceding Scheme.

When payment is made to Smart Pension (AutoEnrolment.co.uk Master Trust) as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the Pension Policy listed in Ceding Scheme information where the whole of the Pension Policy is transferring, or that part of the Pension Policy(s) represented by the payment(s) if only part of the Pension Policy(s) is transferring. I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Smart Pension (AutoEnrolment.co.uk Master Trust) and Ceding Scheme 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. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.



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Please return to:

Group Transfers: [grouptransfers@smartpension.co.uk](mailto:grouptransfers@smartpension.co.uk)

Signature

Date