

Request to Transfer-Out Pension Benefits
Please complete this form using BLOCKCAPITALS**PART A: To be completed by the member in all cases.****Section 1: Personal Details**

Surname:
Former Surname (if any):
First Name:
Title:
Date of Birth:
National Insurance Number:
Phone Number:
Personal E-mail Address:

I am interested in:

A transfer to a registered occupational pension scheme

A transfer to a registered annuity provider

A transfer to a personal pension plan (e.g. PPP or SIPP)

Name and Address of new Scheme Provider:

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Please answer Yes or No to the following questions:

Have you sought pension guidance from a source such as

www.pensionwise.gov.uk

Have you sought regulated financial advice

Have you read the Risk Warnings on the autoenrolment.co.uk web site

www.autoenrolment.co.uk/risk-warnings

By signing this application, you authorise Smart Pension to discuss your current pension plan with the new provider and supply them with all necessary information to facilitate the transfer.

Please sign and date the form:

Signature:

Date:

Notes to members

If you have received advice from a qualified financial adviser, then please forward a copy of the report to us.

Please note that the transfer value provided is not guaranteed and may change. You will receive the net value* at the date of transfer. (*fund value after deduction of Annual Management Charge)

This form should only be completed if you want to transfer your pension benefits to another HMRC registered pension scheme or, for overseas transfers, a Recognised Overseas Pension Scheme - ROPS.

If you want to transfer out of the Autoenrolment.co.uk Master Trust (AEMT), you must complete Part A of this form and send it to your **new provider** who needs to complete Part B and send the form back to us.

Warning to members

By signing this form, you acknowledge and accept that upon the transfer of the Cash Equivalent to another registered pension scheme or plan, all rights and benefits you or your successors in title may have under the Rules of AEMT, will cease.

Once the transfer has been completed, the Trustees of AEMT will be under no obligation to reverse the transaction or otherwise accept you back as a member of this scheme.

From April 2015, pension scheme members can access their pension savings in new ways. Scammers may try to lure you with promises of one-off investments, pension loans or upfront cash (referred to in the press as 'Pension Liberation Scams'). Please refer to the Pensions Regulator's website for more information:

<http://www.thepensionsregulator.gov.uk/individuals/dangers-of-pension-scams.aspx>

Pension scam models are changing. Many scammers are directing members to transfer into single member occupational schemes in an attempt to escape scrutiny. If you are under age 55, you cannot release your pension unless you are in serious ill health. If you are over 55, you can release funds from your pension subject to certain conditions and there is likely to be tax to pay.

We strongly advise all members looking to transfer their funds to obtain financial advice from an FCA-authorised adviser before making any decisions.

Notes for the new provider

Autoenrolment.co.uk Master Trust details:

TPR number

12011089

PSTR number

00820230RM

PART B: Receiving Scheme Warranty

Please make sure this document is fully completed in **BLOCK CAPITALS** before returning it, to avoid any delay in settling the payment.

To be completed by the Trustees/Administrator of the receiving scheme.

Scheme / Contract Name:	
Scheme / Contract Number:	
Scheme Type (delete as appropriate)	DC Trust / Occupational Scheme / Buy-Out Plan / PPP / SIPP / SSAS / Annuity / ROPS
Name of Bank:	
Name in which Account is held:	
Account Number:	
Sort Code:	
BACS Payment Ref:	

Please note, before we can proceed with a transfer for the aforementioned member, we require copies of the following documents: (Please tick alongside below)

- HMRC Certificate for the receiving scheme
- Pensions Regulator Certificate for the receiving scheme

The above-named member has authorised the Receiving Scheme Trustees to accept a Cash Equivalent transfer from AEMT (Transferring Scheme) and confirm adherence to the relevant legislation. Therein the Receiving Scheme Trustees hereby confirm to the Trustees of the Transferring Scheme that all relevant requirements have been satisfied and in particular:

- The Receiving Scheme is a registered pension scheme under the Finance Act 2004 with the PSTR number as shown above and is willing and able to accept the above member's Cash Equivalent Transfer Value. We authorise HMRC to release to the Transferring Scheme such information as required to confirm this registered status;
- The above member is, or will be on receipt of payment from the Transferring Scheme, a member of the Receiving Scheme;
- The Cash Equivalent accepted by the Receiving Scheme will be applied to provide benefits for and in respect of the member in accordance with the applicable relevant legislation and the Rules of the Receiving Scheme;
- Where a pension Sharing Order or Attachment Order exist at the date of transfer and details have been provided by the Transferring Scheme, the Receiving Scheme Trustees undertake

to take any such Order into account in respect of the member's benefits in the Receiving Scheme;

- e. The Receiving Scheme Trustees acknowledge that upon the transfer, all rights the member had under the Transferring Scheme will cease and the Receiving Scheme will meet all future rights of the member.

We note that in consideration of the above warrant, the Trustees of the Transferring Scheme will, upon receipt of this declaration from the member and the Receiving Scheme, forward the Cash Equivalent to the above bank account.

Name of Administrator of Receiving Scheme:	
Position with Company:	
Phone Number:	
E-mail Address:	
Signature:	
Date:	

Please return this form to:

Smart Pension Ltd
40 Eastbourne Terrace
London
W2 6LG

transfers@smartpension.co.uk