

# SIPP transfer in form

## Transferring member instructions

This form is your authority to transfer benefits from another registered pension scheme into a Sippdeal SIPP.

If you are also opening a SIPP at the same time, this form is supplementary to your application form.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0870 160 6099 or by email at BSLadmin@sippdeal.co.uk.

If the transfer is to be made in the form of a cash amount from the transferring scheme (a “cash transfer”) the form must be forwarded to the scheme administrator of the transferring scheme.

**Please do not return this form directly to Barclays Stockbrokers SIPP Administration Team if a cash transfer is being made.**

If the transfer is being made in the form of cash and other assets/investments (an “in specie” transfer) the form must be returned to us at the address below

Barclays Stockbrokers,  
SIPP Administration Team,  
A J Bell Management Limited,  
Trafford House,  
Chester Road,  
Manchester M32 0RS

## To be completed by the transferring member

Full name of member	<input type="text"/>	Date of Birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transferring scheme name	<input type="text"/>								
Member's reference or policy number	<input type="text"/>								
Name of administrator of transferring scheme	<input type="text"/>								
Address of administrator of transferring scheme	<input type="text"/>								
	<input type="text"/>								
Postcode	<input type="text"/>								

Is the transferring scheme a final salary pension scheme? **Please tick a box.** Yes  No

If yes, please note that we will not accept transfers from final salary pension schemes unless you have received advice on the transfer from a suitably qualified financial adviser.

Have you received advice from such an adviser? **Please tick a box.** Yes  No

Is the transfer to be in the form of cash only? **Please tick a box.** Yes  No

Is the transfer to include protected rights? **Please tick a box.** Yes  No

For an in specie transfer, please provide the name and address of the existing investment manager/stockbroker (if applicable). Please also complete the list of assets to be transferred and their values in the assets to be re-registered section below. If this section is not complete this may lead to delays in processing the transfer.

Name of administrator of transferring scheme

Address of administrator of transferring scheme

Postcode  Country

## Assets to be transferred

Asset name/description	SEDOL/ISIN	Unit values (£)

Please continue on a separate sheet if necessary.

# Request for transfer

I request the scheme administrator of the transferring scheme to transfer the value of my benefits under the transferring scheme to the receiving scheme in the form of

1. A cash payment made by cheque, or such other method agreed with Barclays Stockbrokers SIPP Administration Team or
2. An in specie transfer of assets held on my behalf (after deduction of any outstanding liabilities or charges). Where appropriate Barclays Stockbrokers SIPP Administration Team will advise details of the nominee/parties to whom assets must be transferred. I understand that the existing investment manager or administrator of the transferring scheme is responsible for collecting dividends and tax reclaims and realising all rights and entitlements in respect of the assets transferred and for passing them to the receiving scheme.

I authorise the scheme administrator, provider or insurer of the transferring scheme to provide Barclays Stockbrokers, A J Bell Management Limited or Sippdeal Trustees Limited with any information they request regarding my benefits under the transferring scheme. I agree that a copy of this authority will have the validity of the original.

I request the scheme administrator of the receiving scheme to accept the transfer from the transferring scheme and to pay it into my SIPP. I confirm that the information provided relevant to my application to transfer benefits into my SIPP is correct and complete to the best of my knowledge and belief.

I confirm that I have not received any advice or recommendation in relation to the transfer from a representative of Barclays Stockbrokers, A J Bell Management Limited or Sippdeal Trustees Limited.

## **Additional declaration for transfers of income drawdown benefits (if applicable)**

I declare that all, or a part, of the transfer payment has been designated to provide income drawdown pension benefits for me under the transferring scheme. I understand that the transferring scheme is responsible for confirming the amount (if any) designated to provide these benefits.

I further understand that the amount of the transfer payment representing these benefits will be applied to provide me with income drawdown benefits under the receiving scheme and will be subject to the same maximum income limit (if any) as under the transferring scheme, until such time as a further review of this limit is triggered. I also understand that, where the maximum income limit has not been reviewed since 6 April 2011, the transfer may bring forward the date of the review of that limit.

Member's name  Date of Birth //

Member's signature

# Transferring scheme instructions

If you require any further forms to be completed by the transferring member please contact the member directly. For a cash transfer, your cheque must be made payable to 'Sippdeal Trustees Limited re (insert the name of the transferring member)' and sent to the address shown on the first page of this form.

For all transfers you must provide us with full details of the benefits being transferred. The information that you provide must confirm

- that the transferring scheme is a registered pension scheme under the Finance Act 2004
- the transferring scheme's HMRC Pension Scheme Tax Reference
- the total transfer value
- whether the transfer contains any protected rights/contracted out benefits and, if so, full details of them
- whether the transfer contains any crystallised benefits and, if so, full details of them
- details of any transitional protection relating to the benefits of the transferring member and, if relevant, whether the transfer is part of a block transfer
- whether the transfer value derives from a pension sharing order or provision or whether an earmarking order is in force in relation to the transferring benefits.

For information, the receiving scheme is a registered pension scheme under Finance Act 2004 (PSTR: 00605674RH). It is also an appropriate scheme (7001330A).

**For all transfers you must also return this transfer authority form, (or a copy of it), to Barclays Stockbrokers SIPP Administration team at the address shown on the first page of this form.**

Barclays Stockbrokers is the group name for the businesses of: Barclays Stockbrokers Limited, a member of the London Stock Exchange and PLUS. Registered No. 1986161; Barclays Sharedealing, Registered No. 2092410; Barclays Bank Trust Company Limited, Registered No. 920880. All companies are registered in England and the registered address is 1 Churchill Place, London E14 5HP.

All companies are authorised and regulated by the Financial Services Authority.

PensionMaster is administered by A J Bell Management Limited, part of the A J Bell Group.

Telephone: 0870 160 6099 Fax: 0845 543 2601 Email: BSLadmin@sippdeal.co.uk Website: www.stockbrokers.barclays.co.uk

A J Bell Management Limited is registered in England and Wales at Trafford House, Chester Road, Manchester M32 0RS.

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