

MEMBER REF (*Office use only*)

Authority for a transfer of non-protected rights (NPR) benefits from a Liberty SIPP to another approved pension scheme or arrangement (*Tick if applicable*)

Authority for a transfer of protected rights (PR) benefits from a Liberty SIPP to another approved pension scheme or arrangement (*Tick if applicable*)

PART A (TO BE COMPLETED BY THE MEMBER)

Name

NI Number

Address

Postcode

NPR Account Number

PR Account Number

ENHANCED PROTECTION:

We recommend that you seek independent financial advice before completing this section.

Do you have Enhanced Protection of pension benefits that you built up before 6th April 2006? (*Please tick as appropriate*)

YES

NO

If **YES** please send us the certificate issued by HMRC when you registered for Protection or enter its reference number in the box

Please also tick the box opposite if this statement is true: *I have a current Certificate of Enhanced Protection and fully understand that my Enhanced Protection against the Lifetime Allowance Charge may be lost on transfer*

MEMBER DECLARATION:

Please wind up the above plan and transfer the benefits arising to the scheme detailed in PART B below. I confirm that your compliance with this request shall be a full discharge of the liability of Liberty SIPP Limited and Liberty Trustees Limited in respect of the above plan.

Please encash all investments and transfer out in cash

Please transfer all investments in specie; any cash on the RBS Bank account(s) will also be transferred to the Receiving Scheme

Signed

(Member)

Date

Signed

(Authorised signatory, Liberty SIPP)

Signed

(Authorised signatory, Liberty SIPP)

PART B (TO BE COMPLETED BY RECEIVING SCHEME)

Receiving Scheme/Insurer/Policy No:

Address/Post Code of Scheme/Provider

Is the Scheme a Registered Pension Scheme under Chapter II Part IV of the Finance Act 2004? YES NO
If NO the transfer cannot go ahead unless an annuity is being purchased

Will the Receiving Scheme accept Protected Rights and apply them as such for the member? YES NO

HM Revenue & Customs Reference Number

Contracting Out reference (ie ASCON/SCON/ECON/ASCN)

PLEASE TICK THE APPROPRIATE BOX DESCRIBING THE TYPE OF RECEIVING SCHEME

Fully invested in insurance policies with the provider named above

Small Self Administered Scheme (SSAS)

Self Administered Personal Pension (SIPP)

Defined Benefit Scheme

Qualifying Recognised Overseas Pension Scheme

Annuity Provider

PAYMENT INSTRUCTIONS (TICK AS APPROPRIATE)

By cheque Payee

By BACS By immediate transfer eg CHAPS (subject to a charge)

Bank

Address

Sort Code

Account name

Account number Ref

DECLARATION BY RECEIVING SCHEME

I confirm that the above information is correct and agree to the transfer of benefits. I authorise HM Revenue & Customs to confirm, or otherwise, to Liberty SIPP that the Receiving Scheme is a Registered Scheme.

Signature Position

Name (in capitals) Date