

You will need to complete this form to transfer benefits from another pension arrangement to your Liberty SIPP. You will need to complete one form for each transfer you wish to make.

### Beware of pension scams

Falling foul of a scam could mean you lose some or all of your money. See [pension-scams.com](http://pension-scams.com) or [fca.org.uk/scamsmart](http://fca.org.uk/scamsmart) or visit our website for more information.

## Member Details

Client Ref:

Title:

Forename(s):

Surname:

Date of Birth:

National Insurance Number:

Address:

Postcode:

## Transfer Details

Transferring Scheme Name:

Transferring Scheme Address:

Postcode:

Scheme or Policy Number:

Please tick the appropriate box describing the type of Ceding Scheme

Fully invested in insurance policies with the provider named above

Defined Benefit Scheme

Small Self Administered Scheme (SSAS)

Annuity Provider

Self-Invested Personal Pension (SIPP)

Qualifying Recognised Overseas Pension Scheme

Estimated transfer value:

Is the transfer fund Uncrystallised, Partly Crystallised or Fully Crystallised?

Uncrystallised

Partly Crystallised

Fully Crystallised

Is the transfer a full or partial transfer?

Full

Partial

If **partial**, please complete the partial transfers section

Does this transfer include a transfer of assets in-specie?

Yes

No

If **yes**, please complete the In-Specie transfer section, otherwise please move on to the member declaration.



## Partial Transfers

Please provide details of the partial transfer below.

Percentage of fund to be transferred:  % OR Amount of fund to be transferred: £

## In-Specie Transfer

Please provide details below of any assets you are looking to transfer to your Liberty SIPP in-specie.

Asset Provider	Description	Date of last valuation	Value (£)

## Member Declaration

This form gives EBS Pensions Limited the authority to contact your current pension provider and to arrange the transfer of benefits from them to your Liberty SIPP.

This form also gives the transferring pension arrangements authority to give EBS Pensions Limited details of your current arrangements and any relevant paperwork they require in order to transfer.

This form authorises EBS Pensions Limited to request the transfer using the Origo Options Service if this is available.

Do you wish for your adviser to be paid a fee from this particular transaction? Yes  No

If yes, fee amount £  or  % Please do not include the adviser fee if we've already been made aware of your advisers fees on your new SIPP application form.

Print Name:

Signature:

Date:

### The Right to Cancel the Transfer

As we are regulated by the Financial Conduct Authority you have a right to cancel the transfer within 30 days from the date that we receive your transfer request. You will receive this in writing once we have opened the SIPP. If you did want to exercise this right you can do this by emailing us at customerservices@ebspensions.co.uk or by calling 01204 803500. Alternatively you can write to us at EBS Pensions Limited, Dunscair House, Deakins Business Park, Egerton, Bolton BL7 9RP.

If you do decide to cancel the transfer we will do our best to try and return any funds we have received to the transferring scheme although we cannot guarantee that they will accept them back. In this circumstance we would transfer funds to a scheme of your choice and would do this free of charge.

Please note that this right to cancel is a different one to that of the right to cancel the membership.