



InvestAcc
PENSION
ADMINISTRATION LTD

Small Self-Administered Scheme

SSAS

Transfer In Request →

To be completed by the Scheme Member

Receiving SSAS Scheme Name

Member Details:

Full Name of Member	
Address of Member	
	Postcode
National Insurance Number	Date of Birth: (DD/MM/YY)

I wish to transfer my entitlement to benefits from the following pension scheme to the above Small Self-Administered Scheme (SSAS) administered by InvestAcc Pension Administration Limited.

Full Name of Transferring Scheme	
Plan Number	HMRC Pension Scheme Tax Reference
Address of Transferring Scheme	
	Postcode
Contact Name (if known)	

I wish to transfer my uncrystallised pension arrangements

- Yes - full transfer
 Yes - partial transfer (insert amount):
 No
 Not applicable

£

I wish to transfer my crystallised pension arrangements

- Yes
 No
 Not applicable

Are any of the assets being transferred in-specie?

- Yes
 No

If 'Yes' please complete the information requested on the following page. If a property is to be transferred in 'in-specie' please also ensure our SSAS Property / Land Questionnaire for In-Specie transfers is completed.

Details of any assets to be transferred In-specie

Please confirm details of the investments you wish to transfer on an in-specie basis (in other words, those holdings which you wish to transfer between pension schemes, without selling them):

Name of Investment	Type of Investment	Provider	Reference Number	To be transferred in-specie?
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No
				Yes / No

If there is insufficient information on this page then please send extra pages or a letter confirming details. **You should include all types of investment that you wish to be transferred on an in-specie basis, including funds, shares, bank accounts, properties, insurance policies, stockbroker accounts etc.**

Note that you will need to approach the providers of the above investments to request the appropriate paperwork to re-register these investments.

If you are in doubt as to how to complete this form then please contact us or your financial adviser. Note that InvestAcc Pension Administration Limited does not provide Financial Advice.

Have you taken any payments from this pension policy / scheme?

- Yes
 No

If Yes, are you currently drawing a pension income from this pension policy / scheme?

- Yes
 No

If Yes, please complete our Benefit Payment Form if you wish to continue receiving payments after this transfer.

Are you transferring any 'safeguarded benefits' (including employer sponsored pension scheme benefits)?

- Yes
 No

If Yes, we can only accept a transfer if you have obtained advice from a suitably authorised financial adviser. Please insert details of the financial adviser providing advice to you on this particular transfer:

Individual Financial Adviser name	
Financial Adviser firm name	
Financial Adviser Address	
	Postcode
Phone	Email
Financial Adviser FCA authorisation number	

Members Declaration

I hereby consent to InvestAcc Pension Administration Limited requesting the transfer of my entitlement to benefits from the above named scheme, and for InvestAcc Pension Administration Limited to obtain relevant details from this scheme.

I understand any 'Enhanced Protection' will be lost if the transfer is not a 'permitted transfer' as defined by HMRC.

I understand that any entitlement to take lump sum rights in excess of 25% may only be retained on transfer provided the transfer is part of a block transfer as defined by HMRC. However, I understand that if this lump sum figure is over £375,000 and I have enhanced or primary protection the lump sum on these certificates will take precedence.

I understand that any low retirement age may only be retained on transfer if it is part of a block transfer as defined by HMRC.

I understand that it will not be possible to pay any benefits or invest the funds that are transferred until all relevant transfer information has been received.

Signed	Date
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