

Self-Invested Personal Pension

# SIPP

**Transfer In Form**   
**for Minerva SIPP or SIPP Lite**

## Transfer In Request

The Minerva Self Invested Personal Pension Scheme is a registered pension scheme for the purpose of Part 4 of the Finance Act 2004 (formerly an approved personal pension scheme under Chapter IV of part XIV of ICTA 1988) under Pension Scheme Tax Reference 00605996RN.

Note that SIPP Lite is a category of membership within the Minerva Self Invested Personal Pension Scheme.

InvestAcc Pension Administration is not an annuity provider and does not provide benefits in the form of a Scheme Pension.

Title	Forename(s)		
Surname		SIPP Member Number	

I wish to transfer my entitlement to benefits from the following pension scheme to the Minerva Self Invested Pension Scheme administered by InvestAcc Pension Administration Limited. This includes the SIPP Lite category of the Minerva Scheme, where appropriate.

## Transferring Scheme Details

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

### I wish to transfer my uncrystallised pension arrangements

Yes - please insert estimated amount of transfer here:

£

**If you have answered yes above, does the amount above represent the full value of the plan?**

Yes  No

### I wish to transfer my crystallised pension arrangements

Yes - please insert estimated amount of transfer here:

£

**If you have answered yes above, does the amount above represent the full value of the plan?**

Yes  No

**Is the current plan subject to any existing or proposed trustee in bankruptcy orders, or earmarking or pension sharing orders, or other receiving orders?**

Yes  No

**Does the transfer include funds held in any type of occupational pension scheme and / or include any safeguarded benefits such as guarantees, defined benefits or derive from a cash balance arrangement?**

Yes  No (if 'yes', we cannot accept the transfer unless you have received financial advice)

**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 Property / Land Questionnaire for In-Specie transfers is completed.



## Financial Adviser Details

Have you received advice regarding this transfer from a suitably qualified financial adviser who is authorised and regulated by the Financial Conduct Authority (FCA)?

Yes  No

If 'Yes' please provide details:

Financial Adviser Firm Name		
FCA Number (Principal Firm)	FCA Number (Appointed Representative)	
Individual Adviser Name	FCA Number (individual adviser)	
1st line of address		
2nd line of address		
City	County	Postcode
Telephone Number	Fax Number	
Email Address		

By submitting this application form to us, the Financial Adviser firm above confirms acceptance of our current intermediary terms of business, available on our website: [www.investaccpensions.co.uk/termsofbusiness](http://www.investaccpensions.co.uk/termsofbusiness)

**Important - DO NOT enter any figures below** if you are paying your adviser directly, or if your adviser is only to be paid from the underlying investments (from the investment products or investment managers)

**Do you wish us to pay initial fees to the above adviser, from your SIPP funds?**

Yes  No

If 'Yes' please confirm details below:

## Initial Fees

I agree to the following fees being paid to my financial adviser's firm in respect of this transfer.

I understand that this fee applies solely in respect of the advice given to me for this particular transfer.

Advice relating to this transfer

£  Fixed Fee

OR

%

**Should VAT be added to the amounts above?**

Yes  No

## Ongoing Fees

Any on-going fees will be paid at the level already agreed between me and my adviser. If the on-going fees I have already agreed are a percentage of my plan value, I understand that this transfer in will increase the plan value, which will in turn increase the amount of any on-going fees paid to my adviser from my SIPP funds.

**To be completed by your financial adviser:** Please make financial adviser fee payments by electronic bank transfer to the following account until further notice. In the case of Appointed Representative firms, this account must be for the Principal Firm unless we are given written confirmation that the Principal Firm authorises us to make payment direct to an Appointed Representative. If no details are given below, we will use account details previously advised to us, or we will issue fee payments by cheque.

Bank Name		
1st line of address		
2nd line of address		
City	County	Postcode
Account Name		
Account Number	Sort Code	
Payment Reference (e.g. your client or agency reference)		

**Note:** Adviser fee payments cannot be made until the expiration of any applicable cancellation rights or 'cooling off' period. Payments of adviser fees will be made under the reference number you have chosen above, please choose a reference which allows your firm to identify receipt.

## 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 Ltd 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 Legislation.

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 Legislation. 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 Legislation.

I understand that InvestAcc Pension Administration Limited will not pay any benefits or invest the funds that are transferred until all relevant transfer information has been received.

I understand that funds will be held in a designated bank account, in the absence of written investment instructions from me or my financial adviser.

I instruct InvestAcc Pension Administration Limited to debit the above adviser fees from my SIPP funds.

I authorise and instruct you to transfer sums and assets from the plan(s) as listed in the appropriate section of this application directly to the receiving provider and to provide any instructions and/or discharge required by any relevant third party to do so.

I authorise the receiving provider, the current provider and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to the receiving provider.

I authorise the receiving provider, the current provider and any employer paying contributions to any of the plans as listed in the appropriate section of this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to the receiving provider.

Until this application is accepted and complete, the receiving provider's responsibility is limited to the return of the total payment(s) to the current provider(s).

When payment is made to the receiving provider as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in the appropriate section of this application where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.

I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that the receiving provider and the current provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.

X

Applicant Signature	Date
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## SIPP Cancellation Rights - Transfers

When you make your transfer you may have the right to cancel within 30 calendar days. Within this period InvestAcc Pension Administration Limited will invest your funds in accordance with your instructions, however should you exercise your right to cancel then you may not get back the full amount invested.

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The Minerva SIPP is offered without advice of any kind. A SIPP may not be suitable for all investors. If in doubt you should consult an authorised financial adviser.

InvestAcc Pension Administration Limited is the Operator and Scheme Administrator and is responsible for the maintenance and running of the scheme.

InvestAcc Pension Trustees Limited is the Scheme Trustee.

The levels of and bases of taxation can change. The value to an investor of any tax benefits will depend on that investor's tax position. Investors should consult their own tax advisers in order to understand any applicable tax consequence.

InvestAcc Pension Administration Limited is authorised and regulated by the Financial Conduct Authority.

InvestAcc Pension Administration Limited is registered in England and Wales, Company number 7118349.

InvestAcc Pension Trustees Limited is registered in England and Wales, Company number 2875892.



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Best SIPP Provider



Best Pensions Service



Best SSAS Provider