

Transfer form

Use this form if you wish to transfer uncrystallised benefits into your Suffolk Life MasterSIPP.

If you are transferring from more than one scheme, you should complete a separate copy of this form for each additional scheme.

Scheme details

Full name of scheme to be transferred

Type of scheme being transferred e.g. PP, EPP etc.

Transfer value (or estimate) non-protected rights benefits

£

Transfer value (or estimate) protected rights benefits

£

Name of scheme administrator / trustee / insurance company

Address

Postcode

Policy / account number (if applicable)

HM Revenue & Customs reference number (if known)

Please indicate below which of the following statements will apply at the time of the transfer to your Suffolk Life MasterSIPP.

- 1 None of the scheme has begun paying benefits (uncrystallised)
- 2 Some of the scheme has begun paying benefits (crystallised)

This transfer form can only be used for the uncrystallised part of your scheme. If you also wish to transfer the crystallised part, your adviser will provide you with another, different application form.

Assets to be transferred

Type of assets

Please indicate below which of the following apply to your transfer.

- 1 The transfer payment will comprise only cash
- 2 A property, or properties, or an interest in a property or properties are to be transferred
You will need to complete a property form.
- 3 Other assets are to be transferred *in specie* (*in specie* transfers involve transferring shares and other assets without selling them. Please ensure that the current scheme administrator permits this)
Please complete an *in specie* transfer schedule which is available from your adviser or upon request from us. This schedule must be completed in full unless a full current fund valuation containing all the information requested on the schedule is provided. Please also ensure that you read all the notes within the schedule.
Please tick below as appropriate:
 A completed *in specie* transfer schedule is enclosed.
 A full valuation of the fund is enclosed, including SEDOL codes.
All details requested on the *in-specie* transfer schedule must be provided before we can request the transfer.
 A completed *in specie* transfer schedule or full valuation of the fund will follow.
All details requested on the *in-specie* transfer schedule must be provided before we can request the transfer.

Any assets that are not allowable under the terms of the Suffolk Life MasterSIPP must either be sold before we proceed with the transfer or remain with the current scheme.

Declaration and signature for transfers

Declaration Please read and sign the declaration below to authorise the transfer(s).

- *I declare that to the best of my knowledge and belief the statements made in this section (whether in my handwriting or not) are correct and complete.*
- *I understand that, in accordance with the terms and conditions, a fee may be charged in respect of the transfer of the above scheme.*
- *I hereby consent to Suffolk Life obtaining details from the administrator / trustee or insurance company or other pension provider of any scheme, contract or arrangement of which I am or have been a member in connection with the transfer and authorise the giving of such details to Suffolk Life.*

I also consent to my adviser:

Adviser firm name

Firm FSA number

obtaining the same details.

- *While Suffolk Life will request transfers in a timely manner, I understand that Suffolk Life is not responsible for the timely completion of the transfer.*
- *I understand that Suffolk Life will not request any in specie transfer until all of the information requested in the in specie transfer schedule has been provided and any necessary account with an investment manager or execution-only broker has been established.*
- *I wish for the pension scheme benefits detailed overleaf to be transferred to my Suffolk Life MasterSIPP.*

Please note: It is a serious offence to make false statements. The penalties are severe. False statements could lead to prosecution.

Name of investor

Signature of investor

Date

www.suffolklife.co.uk

Suffolk Life is the trading name of Suffolk Life Pensions Limited (registered in England and Wales number 1180742) and Suffolk Life Annuities Limited (registered in England and Wales number 1011674).

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

Suffolk Life Pensions Limited is the operator and scheme administrator of the Suffolk Life MasterSIPP.

Suffolk Life Trustees Limited (registered in England and Wales number 6341296) is the trustee.

Suffolk Life Annuities Limited is an insurance company that provides the trustee investment plans to the trustee to hold commercial property investments or into which protected rights benefits may be invested.

The registered address of all companies is 153 Princes Street, Ipswich, Suffolk, IP1 1QJ

Tel: 0870 414 7000 Fax: 0870 414 8000

Telephone calls to Suffolk Life are recorded for training, monitoring and fact verification purposes.

SUFFOLKLIFE
THE INTELLIGENT APPROACH