

ELECTION TO POOL

POOLING OF NON PROTECTED RIGHTS AND PROTECTED RIGHTS FUNDS

What is pooling?

- Currently, if both non protected rights and protected rights are held at Suffolk Life, they must be held in separate plans- either with each as part of our MasterSIPP or with the non protected rights in the Suffolk Life SIPP and protected rights in the MasterSIPP. However, starting from mid March 2010, we will enable pooling of both types of benefits within a single plan in the Suffolk Life MasterSIPP.
- No plans will be pooled unless we receive a completed Election to Pool form.

Who should complete this form?

- This form is for those plan holders with protected rights in the Suffolk Life MasterSIPP and non protected rights either in the MasterSIPP or Suffolk Life SIPP who wish to pool their funds in a single plan in the MasterSIPP. We would strongly recommend that you consult your financial adviser before completing the form to ensure that pooling is suitable for you.
- This form is not to be used if you do not already have a MasterSIPP but wish to apply for one. If this is the case, please contact your financial adviser or us. All new MasterSIPP applications must be made via an authorised financial adviser.

Where can I get further information?

- Please see our Pooling Fact Sheet for full details or contact your financial adviser. We can provide a copy of the Pooling Fact Sheet on request.

Declaration

- **I wish for all of my existing SIPP funds to be pooled within a single plan in the Suffolk Life MasterSIPP**
- **I confirm that I have received a copy of the Pooling Fact Sheet and agree that my pooling request will be subject to the conditions set out within that document (if you are in any doubt about the conditions please contact either your financial adviser or us for further information)**
- **I understand that Suffolk Life will contact me, via my adviser where I have previously elected one, to confirm the date when the process of pooling my plans will begin**
- **I understand that should I decide in the meantime not to proceed with pooling, any fees that were waived under this election will be charged**

Investor's name

Investor number / plan numbers

Signature

Date

[This is a standalone document](#)