

D. Notes

- You may lose any protected tax free cash on transfer.
- Where you qualify for a protected retirement age this may be lost on transfer.
- If you have applied to HM Revenue & Customs for Enhanced or Fixed Protection this may be lost if the transfer is not a permitted transfer.
- If you choose to transfer, please note that restrictions may apply to trading and other plan amendments in the period immediately preceding the date of transfer. These will apply while we prepare your plan for transfer. You can ask us for further information on any restrictions that apply.
- Should you have any queries relating to the above please seek financial advice.

E. Signature

Complete this section in all cases.

Before signing this form, it is important that you fully understand the implications of transferring to another pension scheme. By transferring, you will be giving up your benefits under the policy referred to above. If you are unsure, you should seek financial advice before taking any action.

I authorise the transfer to the Scheme as detailed overleaf.

Signed



Date

15 May 2023

If you would like a Braille, large print or audio version of this document, please contact us.

We work hard to keep your personal data secure, which includes regularly reviewing our privacy notice. When there's an important change we'll remind you to take a look, so you're aware how we use your data and what your options are. Please review the latest privacy notice at www.scottishwidows.co.uk/legalprivacy or ask for a copy on 0345 300 2244.