

Ready-made pension

Transfer in form



This form lets you transfer cash from another UK-registered pension scheme into your AJ Bell Ready-made pension. Keep in mind that you can't transfer a pension, which you've already accessed, so where you've already taken tax free cash and/or income.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

When your transfer form is signed and completed, please post the completed form to us at:

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Personal details

Title

Dr / Mr / Mrs / Miss / Ms / Other **Ms**

Surname

Telford

Forename(s)

Gillian

Date of birth

30 Aug 1974

National Insurance number

JB367400A

Permanent residential address

18 The Orchards, Lancashire, Leyland,

Postcode

PR26 7SZ

Country

UNITED KINGDOM

Daytime telephone number

07920 427835

Email address

gtelford@verveaccountancy.co.uk

AJ Bell Ready-made pension account number

AC2NWDP

Please ensure that your personal details held with the pension scheme you're transferring from match the above as differing details may delay your transfer.

Your transfer details

Current provider

Haines Watts (Preston) Limited SSAS

Existing plan number or policy number under transferring scheme

JB367400A

Is the transferring scheme a defined benefit/final salary pension scheme or a scheme that includes safeguarded benefits?

Yes

☒ No

When you transfer a defined benefit/final salary pension scheme or a scheme that includes safeguarded benefits you give up a guaranteed income, as well as potential increases to that income in the future. For most defined benefit/final salary pension schemes or schemes that include safeguarded benefits, you'll need to take regulated financial advice before you can transfer it.

We can only accept a defined benefit/final salary pension scheme or a scheme that includes safeguarded benefits transfer worth £30,000 or more if a suitably qualified financial adviser has recommended that the transfer is right for you.

To confirm you've received their recommendation, you and your adviser need to complete our [financial advice declaration form](#). You can also find this form on the 'Useful forms' section of [ajbell.co.uk](#). Please send the completed form back to us along with this one.

Important - please note that if you are transferring from a defined benefit/final salary pension scheme or a scheme that includes safeguarded benefits and the expiry date of any transfer value guarantee is less than 10 working days away, then whilst we will do our very best, we cannot be held responsible if the deadline is missed. You are advised to keep in regular contact with the transferring scheme to check on progress.

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

Approximate value to be transferred to AJ Bell

£ 55,000

This is a full transfer



This is a partial transfer



Request for transfer

I authorise and instruct you to transfer funds from the plan(s) as listed in this form directly to the receiving provider and to provide any instructions and/or discharge required by any relevant third party to do so, in the form of a cash payment.

Where you have asked me to give you any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan(s).

I authorise you and AJ Bell or AJ Bell Management Limited or Sippdeal Trustees Limited to obtain from each other, and release to each other, any information that may be required to enable the transfer of funds to the receiving scheme. I agree that a copy of this authority will have the validity of the original.

I authorise you and AJ Bell or AJ Bell Management Limited or Sippdeal Trustees Limited and any employer paying contributions to any of the plan(s) as listed in this form to obtain from each other, and release to each other, any information that may be required to enable the transfer of funds to the receiving scheme.

Until this application is accepted and complete, the receiving scheme administrator's responsibility is limited to the return of the total payments to the current plan.

Where the payment(s) made to the receiving scheme represent(s) all of the funds under the plan(s) listed in this form, then payment made as instructed will mean that I shall no longer be entitled to receive pension or other benefits from the plan(s) listed.

Where the payment(s) made to the receiving scheme represent(s) part of the funds under the plan(s) listed in this form, then payment made as instructed will mean that I shall no longer be entitled to receive pension or other benefits from that part of the plan(s) represented by the payment(s).

I promise to accept responsibility in respect of any claims, losses and expenses that AJ Bell or AJ Bell Management Limited or Sippdeal Trustees Limited and the current provider may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

I request the scheme administrator of the receiving scheme to accept the transfer from the transferring scheme and to pay it into my Ready-made pension. I confirm that the information provided relevant to my application to transfer benefits into my Ready-made pension is correct and complete to the best of my knowledge and belief.

I accept that in order to comply with regulatory obligations, the receiving scheme and the current scheme named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.

I confirm that I have not received any advice or recommendation in relation to the transfer from a representative of AJ Bell, AJ Bell Management Limited or Sippdeal Trustees Limited.

Your name

Date

GILLIAN TEFORD

8/8/24

Your signature

G TEFORD

What happens next?

Once we receive your completed form, we'll contact the scheme administrator of your pension to get your transfer started. We'll try to complete your transfer as soon as possible – as a guide, cash only should take 2-6 weeks but exactly how long it takes will vary depending on the following factors:

- How long it takes your current provider to respond to our requests
- Whether the documentation required by us or your current provider is completed correctly
- Whether you still have to pay fees to your current provider, including closure and administration fees

And once your transfer has been received, we'll let you know – and undertake the process to invest this in your chosen AJ Bell fund.

Transferring scheme instructions

If you require any further forms to be completed by the transferring customer please contact the customer directly.

For all transfers you must provide us with full details of the benefits being transferred. The information that you provide must confirm:

- that the transferring scheme is a registered pension scheme under the Finance Act 2004
- the transferring scheme's HMRC Pension Scheme Tax Reference
- the total transfer value
- details of any transitional protection relating to the benefits of the transferring customer (including protected pension age benefits) and, if relevant, whether the transfer is part of a block transfer
- whether the transfer value derives from a pension sharing order or provision or whether an earmarking order is in force in relation to the transferring benefits.

For information, the receiving scheme is a registered pension scheme under Finance Act 2004 (PSTR: 00605674RH). It is also an appropriate scheme (7001330A).