



Transfer Out option form

Please return this form to:
Universities Superannuation Scheme Limited,
Royal Liver Building, Liverpool, L3 1PY

Please complete this form using BLOCK CAPITALS

Member Number 48347048

Full name SARAH LOUISE HAGUE

IMPORTANT:

Please be aware that only one free transfer quotation, per benefit section, will be issued in any 12 month period. There will be a charge (currently £235) for further transfer quotations provided within 12 months of your original request.

Transfer option

A transfer to another registered pension scheme - All USS benefits from the USS Retirement Income Builder and the USS Investment Builder



I would like to explore the possibility of transferring my USS Retirement Income Builder and my USS Investment Builder benefits to another registered pension scheme. Please send me a current transfer value and discharge forms.

A transfer to another registered pension scheme - the USS Retirement Income Builder only



I would like to explore the possibility of transferring my USS Retirement Income Builder benefits to another registered pension scheme. Please send me a guaranteed current transfer value and discharge forms.

A transfer to another registered pension scheme - the USS Investment Builder only



I would like to explore the possibility of transferring my USS Investment Builder benefits to another registered pension scheme. Please send me a current transfer value and discharge forms.

Receiving scheme details

Name of new scheme (please provide details if known):

ISTRAT SSAS (C/O CRANFORDS)

Member reference number of new scheme: TBC

Name of administrators or insurance company: CRANFORDS

Address of administrators or insurance company: 48 CHANCERY NEW ROAD, BOLTON
LAINES. BL7 4AP.

Date joined new scheme: TBC

Yes

No

☒☐

For UK transfers: Can the receiving scheme accept the transfer under the public sector 'Club' arrangements?

☐

If the proposed transfer is to a qualifying recognised pension scheme (QROPS) outside the UK, please tick this box as we will need to send you different forms.

Additional information (optional)

Please tell us why you are interested in this information:

☒

I am interested in transferring my USS benefits to another scheme that offers Flexible Access Drawdown (FAD)/Uncrystallised Funds Pension Lump Sum (UFPLS) provision. I understand that it is my responsibility to notify USS that I am accessing my funds for these reasons as it will affect my annual allowance.

☐

I am interested in transferring my USS benefits to another scheme regardless of FAD/UFPLS provision.

☒

My financial advisor needs this information in order to produce a Transfer Value Analysis report (TVAS).

☐

I want to understand what the transfer value of my USS benefits is simply out of interest. This will result in a non-guaranteed transfer value being provided without discharge forms.

☒

Other. Please state reason: Commercial property investment

Transfer option declaration

I understand that the first quote for any section of benefits is free and any future quotes for the same section of benefits in the following 12 months will incur a fee (currently £235).

Name:

SARAH HAGUE

Home address:

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SHEFFIELD

S26 1JG

Member's signature:

[Signature]

Date:

Data Protection

The information provided will be processed by Universities Superannuation Scheme Ltd for purposes only associated with the Universities Superannuation Scheme and will be used in accordance with its policies, the Trust Deed & Rules and the Data Protection Act 1998.