

For customers and scheme trustees

Request to transfer to another provider

Please read these notes before filling in this form.

About this form

This form is for transferring your pension fund with Aegon to another provider (the receiving scheme).

Before completing this form please check to see if the receiving scheme uses the Option Transfer Service by visiting www.origoservices.com/OurServices/OptionsTransfers/Options_Transfers_Customers.aspx

If the receiving scheme does use the Option Transfer Service, contact them directly to issue you with the forms you need to complete, instead of using this one.

Completing this form

This form is split into three parts. The part you complete will depend on the plan you have with us.

Part A – Transfer instruction (non-occupational pension schemes)

Complete Part A if you have a:

- Personal Pension plan, Group Personal Pension plan or Group Self-invested Personal Pension plan
- Stakeholder Pension plan or a Group Stakeholder Pension plan
- Flexible Pension Plan
- Retirement Control plan
- Reflex Personal Pension plan
- Reflex Control Pension plan
- Retirement annuity plan
- a Section 32 Buyout plan or a Trustee proposed Section 32 Buyout plan

Then send the form to the receiving scheme.

Part B – Transfer instruction (occupational pension schemes)

Complete Part B if you are a scheme trustee of:

- an Executive Pension plan
- a Small Self-administered scheme
- an Exsel Group scheme
- a Nexus scheme
- a SEL scheme
- an Exsel scheme
- an Exselfund scheme

Then send the form to the receiving scheme.

Part C – The receiving scheme completes Part C and return the completed form to Aegon, Freepost EH1218, Edinburgh EH12 0BR

Additional information

- Please complete this form in BLOCK CAPITALS and ballpoint pen.
- We explain terms shown in **bold** in the definitions section in Part D.

Part A – Transfer instruction (non-occupational pension schemes)

1. Personal details

Title

Mr / Mrs / Miss / Ms / Other – please specify

Date of birth (dd/mm/yyyy)

Full forename(s)

National Insurance number

--	--	--	--	--	--	--	--	--

Surname

Plan number (the 'plan')

2. Transfer details

I want you to pay the transfer value of my plan to:

Receiving insurer name

Reference

Address

Postcode

If the receiving scheme is a qualifying recognised overseas pensions scheme, we'll provide you with an additional form to complete.

3. Declaration

In this declaration 'I' means the individual named in Section 1 and 'you' means Aegon (a brand name of Scottish Equitable plc).

Date (dd/mm/yyyy)

Planholder signature

X	X
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- 3.1

I request that you pay the transfer value of the plan to the receiving scheme.
- 3.2

I confirm that this payment represents a full discharge of your liabilities under the plan.
- 3.3

I've been made aware of my pension options, tax implications and associated risks by Pension Wise, Aegon or an adviser.

Part B – Transfer instruction (occupational pension schemes)

4. Member’s personal details

4.1 Please enter the member’s details

Title

Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth (dd/mm/yyyy)

National Insurance number

Plan number (the ‘plan’)

5. Transfer details

We want you to pay the transfer value for the member to:

Receiving insurer name

Reference

Address

Postcode

If the receiving scheme is a qualifying recognised overseas pensions scheme, we’ll provide you with an additional form to complete.

6. Declaration

In this declaration ‘we’ means the scheme trustees and ‘you’ means Aegon (a brand name of Scottish Equitable plc).

- 6.1

We request that you pay the transfer value of the policy to the receiving scheme.
- 6.2

We confirm that this payment represents a full discharge of your liabilities under the policy.

Date (dd/mm/yyyy)

Scheme trustees (print names)

Scheme trustees (signatures)

X

X

X

X

Part C – Receiving scheme declaration

7. Bank details

Please give details of where the transfer payment is to be made.

Name of bank

Address

Postcode

Bank sort code

–

–

Account number

8. Declaration

In this declaration ‘I/we’ means the receiving scheme and ‘you’ means Aegon (a brand name of Scottish Equitable plc).

8.1 I/We confirm that the receiving scheme is:

☐ A UK pension scheme registered by HM Revenue & Customs (HMRC) under Chapter 2 of Part 4 of the Finance Act 2004. The HMRC reference is:

And attach a copy of the HMRC scheme registration letter

☐ A qualifying recognised overseas pension scheme. We enclose a copy of the acceptance letters from HMRC Audit and Pension Scheme Services confirming the receiving scheme is a qualifying registered overseas pension scheme.

8.2 I/We declare that the receiving scheme is prepared to accept the transfer payment and that it will be used to provide appropriate retirement benefits within the receiving arrangement. We confirm that the information given is accurate to the best of my/our knowledge and belief.

8.3 I/We declare that I/we have full power to give this declaration on behalf of the receiving scheme.

Date (dd/mm/yyyy)

Signed for and on behalf of the receiving scheme

X

X

Position

Part D – Definitions

Non-occupational pension scheme – is a contract-based pension scheme, such as a:

- Personal pension
- Group Personal pension
- Stakeholder pension
- Group Stakeholder pension
- Retirement annuity contract (section 226 contract)
- Section 32 buyout, or
- Trustee proposed section 32 buyout

Occupational pension scheme – is a trust based pension scheme, such as:

- an Executive Pension plan
- a Small self-administered scheme
- an Exsel Group scheme
- a Nexus scheme
- a SEL scheme
- an Exsel scheme
- an Exselfund scheme



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