

**The Global SIPP
Transfer Discharge Form**

Part A – To be completed by the Member

Scheme	The Global SIPP
SIPP Reference Number	
Client Name	

I hereby resign as Trustee of the above Global SIPP and surrender to Guinness Mahon Trust Corporation Limited (GMTC) all under the above said plans. In consideration of this surrender I authorise GMTC to transfer the proceeds of the plan to the Scheme detailed in Part B.

I understand that the Transfer Value is indicative only and may depend on the value of unrealised assets when they are sold or transferred in specie to the new scheme.

I accept that any charges in respect of the transfer will be debited from my plan before it is transferred and that this may result in a lower transfer value.

I am aware that a transfer to any scheme other than a Registered UK Pension Scheme or Qualifying Registered Overseas Pension Scheme (QROPS) would constitute an unauthorised withdrawal and would not be permitted.

I understand that a transfer to a QROPS is a benefit crystallisation event, and that any lifetime allowance charge that may be incurred will be deducted from my fund before it is transferred.

I understand that GMTC will undertake due diligence to verify the status of the receiving scheme.

The cash transfer value will be derived from the sale of my plan investments or as otherwise provided by in specie / transfer / assignment following receipt of this fully completed discharge form.

IMPORTANT – No Transfer will be permitted without evidence of the receiving schemes Pension Scheme Tax Reference Number.

Transfer Option (Please Tick)

Cash Transfer Value – Assets are to be realised and the cash balance transferred to the receiving scheme.	
In Specie Transfer – I require my assets to be transferred to the receiving scheme in specie.	

Declaration of Entitlement.

I declare that I am legally entitled to the plan and the benefits it secured. In consideration of the payment by you or the transfer of assets, in accordance with these instructions, I indemnify you against all claims or proceedings made against you in respect of the plan, and against all resulting losses and expenses which you may incur. The payment of the transfer value represents discharge of any entitlement that I or any beneficiaries may have under the scheme.

Signed MRS J Anderson.

Name MRS J ANDERSON.

Date 14/6/16.

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Part B – To be completed by the Receiving Scheme

I agree to accept the transfer which is to be made to:

Name of Scheme:

**Address of Scheme
Administrator**

**PSTR Number
ASCON Number**

Please make cheques payable to

.....

Please pay any funds in respect of the transfer to:

**Bank
Sort Code
Account Number
Account Name
Reference**

Where assets are being transferred in specie, please confirm how the assets are to be registered

Registration Details for Certified Stock

Name of Stockbroker

Contact Name

Contact Details**Receiving Scheme Warranty**

We confirm that we are able to accept a transfer from the The Global SIPP PSTR 00805689RT which is registered under Chapter 2 of Part 4 of the Finance Act 2004.

We confirm and warrant that the details above are correct and may be relied upon in making a transfer to us.

If we have agreed to receive assets in specie we further warrant that we are able to receive all securities within the transferring plan.

Signed**Name****Position****Date**



Guinness Mahon

Trust Corporation

Guinness Mahon Trust Corporation Limited

3 Castlefield Court
Church Street
Reigate
Surrey
RH2 0AH

Telephone 01737 244151
Facsimile 01737 222403

Mrs J Anderson
23 Bailey Avenue
Ellesmere Port
Cheshire
CH65 3BH

17 February 2016

Dear Mrs Anderson,

The Global SIPP - 2698

I write with reference to our recent telephone conversation in respect of an information request submitted by Pension Reports.

In accordance with your instruction, please find enclosed the information pack we would have sent out to them.

I can confirm that Pension Reports are no longer authorised to obtain information on your plan and that no information has been provided to them previously.

If you have any queries regarding the documents, please do not hesitate to contact us.

Yours sincerely

Ben Salter DipPFS
Guinness Mahon Trust Corporation
gm@pantrustees.co.uk