

# Transfer Out Questionnaire

(To be completed by the receiving scheme)

Please ensure you have received the member's discharge form, and return it with this form and the documents listed below to:

Fidelity Service Centre  
Beech Gate  
Millfield Lane  
Lower Kingswood  
Tadworth  
Surrey  
KT20 6RP

## IMPORTANT – documents you need to send us

Please include ALL of the following documents when you return this form. **We will not be able to proceed with the transfer unless we have this evidence of the receiving scheme's status.**

- Evidence from HMRC that the scheme has been approved as a registered scheme, and that its registration is up to date.
- Confirmation of the scheme details and the scheme administrator (such as a screen print of the Administrator pages of the HMRC website).
- Proof that the scheme is registered with The Pensions Regulator (if there is more than one member of the scheme at PSTR level).

**NOTE** - Please note it is not our policy to complete or sign applications, or other forms supplied to us by the administrators or insurers of other pension arrangements. This includes any documentation on equalisation. The administrators of other pension arrangements must confirm that they are prepared to accept the transfer on this basis.

## About the transfer

Name of member:	Mr Pawel Kuzdak
Name of plan:	Virgin Media's Pension Plan
Plan type:	Group Personal Pension Plan
Pension Scheme Tax reference:	00605553RY

Registered in accordance with Chapter 2 of Part 4 of the Finance Act 2004.

Equalisation is not applicable for benefits held in the transferring plan.

Fidelity reference: C07600C

About the receiving scheme

Full name of receiving scheme:	PK Wealth SSAS
Pension Scheme Tax reference:	20003492RM
Scheme administrator:	RC Administration Ltd
Full address of scheme administrator:	1A Park Lane, Poynton, Cheshire, SK12 1RD
Reference number with The Pension Regulator:	N/A - this is a one member scheme

Type of scheme(Please tick one box)

Occupational pension scheme:

- ☐ Insured Scheme
- ☒ Small Self-Administered Scheme
- ☐ Large Self-Administered Scheme
- ☐ Other

Name and address of sponsoring employer:	PROPLAND LTD, 7 Bell Yard, London, England, WC2A 2JR							
Date when the member named above joined the sponsoring employer:	2	8	0	4	2	0	2	0 (DDMMYYYY)

If the member name above is not employed by sponsoring employer, please explain how they meet the scheme's eligibility criteria.

Personal pension scheme:

- ☐ Insured
- ☐ SIPP
- ☐ Non-insured
- ☐ Other
- ☐ Partly insured
- ☐ Buy Out Plan
- ☐ Relevant statutory scheme
- ☐ Other



## Bank account details for BACS/CHAPS transfer

Bank name:	Metro Bank
Bank address:	One Southampton Row, London, WC1B 5HA
Account name:	PK Wealth SSAS
Sort code:	23-05-80
Account number:	44592479
Payment reference:	Fidelity Transfer P Kuzdak

We declare that:

- The receiving scheme is registered with HMRC.
- This will be a recognised transfer.
- We will not take any action, or omit to take any action, which would result in an unauthorised payment.
- We will only use the amount transferred to provide benefits permitted for registered pension schemes.
- We are willing and able to accept the transfer.
- If the transfer includes crystallised funds, we are able to accept them and confirm that no further tax-free cash will be paid from them.
- We will not take action of any kind against FIL International Limited in connection with the transfer.
- FIL International Limited will have no liability arising from the pension benefits that are transferred.
- The information we have given on this form is correct, to the best of our knowledge, and we will tell FIL International Limited immediately if any of it changes.

Name:	David Nicklin
Position:	Director

Capacity in which you are signing this declaration (for example, scheme administrator/trustee/ third party/ broker/financial adviser):

Company name:	RC Administration Ltd									
Company address:	1A Park Lane, Poynton, Cheshire, SK12 1RD									
Telephone number:	0330 311 0839									
Email address:	info@rcadministration.com									
Signature:	Dave to sign and date									
Date:										(DDMMYYYY)

Pension Plan will not make a transfer payment until it is satisfied of these facts, and that this may delay the transfer.


e) I understand that, as a result of the transfer, I may lose any right to a protected pension age, protected tax-free cash and/or any lifetime allowance protection I may have.

f) I understand that, if my new scheme is designed to give me access to my pension benefits earlier than is normally permitted, there is a serious risk of significant tax charges. I acknowledge that Virgin Media's Pension Plan does not know whether or not my new scheme is designed to do this.

g) I have read the 'Important information about pension transfers', which I received with this form, as well as the leaflet on pension scams.

h) Once the transfer is made, Virgin Media's Pension Plan will have no liabilities in respect of the amount transferred. I will not hold it responsible for any tax charges, significant fees or other losses that arise from the transfer and will not seek compensation or payment of any kind from it or take any action against it in relation to such charges, fees or losses.

i) The information I have given on this form is correct to the best of my knowledge and I will tell Fidelity immediately if any of it changes.

Name	Mr Pawel Kuzdak
National Insurance Number	PN 978151D
Date of Birth	26.06.1975
Address	14 LIME CLOSE, NEWBURY RG14 2PW
Signature	
Date	04.04.2022



# Partial Transfer Discharge Form

(To be filled by member)

When you have completed this form, please send it to your new provider, with the enclosed questionnaire. They will send both forms back to us.

Name of member:	Mr Pawel Kuzdak
Fidelity reference:	C07600C

Your phone number (in case we need to check anything) : 0777 0657 777

Name of the scheme you are transferring pension savings to: PK WEALTH SSAS

Have you taken advice about this transfer from an FCA-regulated financial adviser? (Tick the relevant box)

☐ Yes ☒ No

If you answered 'Yes', please give the following details:

Name of adviser:	
Company:	
Address:	
FCA number:	

I wish to take a partial transfer of my benefits:

Please state either amount £ \_\_\_\_\_ or <sup>PK</sup> 199 % of fund value  
(99%)

I declare that:

- a) I have chosen to transfer pension savings to the scheme named above.
- b) I have been given details of the pension benefits I will be entitled to in my new scheme.
- c) I have received a transfer illustration and I understand that the value it shows is not guaranteed. The amount transferred will be the proceeds actually arising from the sale of the investments in my pension account.
- d) I understand that Virgin Media's Pension Plan may check that my new scheme is registered with HMRC and that this will be a recognised transfer for HMRC purposes. I also understand that Virgin Media's