

## Transfer Out Instruction

- To request us to transfer your benefits to another pension scheme
- **For completion and signing by the scheme Member and on behalf of the receiving scheme.**

### 1. Member Details

Pension Scheme Name

Forename(s)

Surname

Member Number

Home Address

**Note:** If unknown, please leave blank.

### 2. Transfer Details

Full Transfer

☐

Partial Transfer

☐

**Note:** Please tick.

If a partial transfer:

Amount

£

or % of fund

%

Cash Transfer

☐

Or in-specie

☐

**Note:** Please tick.

If in-specie details of assets/cash to be transferred

Reason for transfer

### 3. Receiving Scheme

Scheme Name

Scheme Address

Membership Number

**Note:** If unknown, please leave blank.

A UK Registered Scheme

☐

Or a Qualifying Recognised Overseas Scheme

☐

**Note:** Please tick.

If UK Scheme the PSTR

Membership Number

**Note:** If a Qualifying Recognised Overseas Pension Scheme (QROPS), we require a copy of the HM Revenue & Customs letter of acceptance.

Cheque details for cash transfer

Or bank details for telegraphic transfer

Bank

Branch

Sort Code

Account Name

Account Number

Reference

IBAN Number

**Note:** For overseas accounts only.

## 4. Member's Declarations

- I hereby authorise and request the Trustees of the pension scheme named above to transfer the value of my accrued benefits under the scheme as specified to the receiving scheme.
- I understand and acknowledge that payment of the transfer value shall discharge the Trustees from all liability with regard to those benefits and any statutory right to them that I may have and in consequence neither I nor any present or future spouse or dependants shall have any future entitlement to those benefits under the Scheme.
- I understand and acknowledge that the Trustees will determine the value of my entitlement under the pension scheme and this will be calculated by Whitehall Trustees Limited. I agree to be bound by the results of this calculation.
- I understand that the benefits provided by the Transfer Value may be in a different form and of a different amount from those which would have been payable under the provisions of the Scheme.
- I acknowledge that the Trustees will not be responsible for the amount or type of benefits to be provided by the receiving scheme.
- I confirm that no part of any commission in connection with this transaction has been or will be paid to me.

## 5. Receiving Scheme Declarations

- I confirm that the receiving scheme is permitted to receive the transfer from the above pension scheme.
- I confirm that the information provided about the receiving scheme is correct and I am willing to accept the transfer value

## 6. Signatures

### Member's Signature

Print Name

Signature

Member

Date

### Signature on behalf of the Receiving Scheme

Print Name

Signature

Authorised Signatory

Date

Please correspond with us



[enquiries@whitehallgroup.co.uk](mailto:enquiries@whitehallgroup.co.uk)



Whitehall Group (UK) Ltd  
Warth Business Centre  
Warth Road  
Bury  
Lancashire  
BL9 9TB



03302 232300

Whitehall is the trading name of:

Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294) and Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590). All three companies have their registered office at 41 Greek Street, Stockport, Cheshire, SK3 8AX.

