

TRANSFER CHECKLIST

Policyholder name:

Royal London Plan number:

Scheme name:

ROBINSON FAMILY SSAS.

Please provide the information listed below to enable us to assess your transfer request against the Pensions Regulators guidance for pension providers. **When this form refers to the scheme, it means the scheme to which you are considering transferring your pension benefits.**

Section 1 – you will need to ask the receiving scheme to help you complete this section

Description of information required	Information enclosed? If not, please provide a reason why
A copy of the letter from Her Majesty's Revenue & Customs (HMRC) confirming the scheme's registered status and Pension Scheme Tax Reference (PSTR) number.	ENCLOSED
A copy of the online printout from the Pensions Regulator that confirms the scheme has been registered with them and shows the scheme's PSR number. If the scheme is not registered please provide the reason why.	ONE MEMBER SCHEME SO NOT REGISTERED WITH PENSIONS REGULATOR
A copy of the scheme's trust deed and rules.	ENCLOSED
The full name and address of the company responsible for administering the scheme.	PENSION PRACTITIONER. COM DAWS HOUSE, 33-35 DAWSLANE LONDON. NW7 4SD
A copy of the scheme's policy on the payment of benefits to members and their dependants.	SEE SCHEME RULES
A copy of the basic information about the scheme that has been provided to you as someone considering becoming a member of the scheme. This is often in the form of a scheme or membership booklet or key features.	ENCLOSED
Full details of the company which acts as the main or principal employer in the scheme, including: <ul style="list-style-type: none"> company name registered address company registration number date of incorporation of the company? business, service or trade provided by the company? 	ROBINSON CONTRACT SERVICES LIMITED WEIGHBRIDGE YARD CATFOSSE LANE BRANDESBURTON DRIFFIELD, EAST YORKSHIRE YO25 8ES Co. No.: 04934150 16/10/2003 AGRICULTURAL + RECYCLING PRODUCTS & SERVICES FOR FARMERS & THE WATKINS INDUSTRY

Section 2 – to be completed by you, the member

The receiving scheme	
How were you made aware of the receiving scheme? Were you contacted by the scheme, or the scheme administrator, referred by someone, or did you approach them?	I APPROACHED.
Has the scheme (or its administrators) contacted you with official documentation or has all communication been by text, email and/or telephone?	OFFICIAL DOCS.
Has an agent of the scheme or a courier been to your home to complete or collect documentation?	NO
Please provide a copy of any promotional materials, e-mails and letters you have received in relation to the scheme.	ENCLOSED.
What do you want to achieve through the transfer that you can't in your current scheme?	TO ASSIST WITH PURCHASE OF PROPERTY (COMMERCIAL)
Is the scheme to which you are transferring a Self Invested Personal Pension (sometimes known as a "SIPP")? If so, please provide the name and address of the SIPP operator.	NO.
Have you been offered a loan, savings advance, cash back, cash bonus, or other incentive as a result of this transfer?	NO.
Have you been advised that you may be able to access your benefits from the new scheme before the age of 55 with no mention of having to satisfy any poor health condition?	NO.
Are you being encouraged to carry out the transfer as quickly as possible? Are investments or incentives only available for a limited time?	NO.
Have you been told that you will be able to draw a tax free cash sum greater than 25% as a result of transferring?	NO.

Your employment	
Do you receive earnings from employment? If you do, please provide evidence of your earnings.	ENCLOSED.
Are you currently employed by the company which acts as the main/principal employer under the scheme? If so, please provide the address of your usual place of work.	WEIGHBRIDGE YARD, CATFOSSE LANE BRANDESBURTON DRIFFIELD, EAST YORKSHIRE YO258ES.
If you are not employed by the company that acts as the main or principal employer under the scheme, please provide the name and address of your current employer and advise what connection you have to the main or principal employer under the scheme and the reasons why you want to transfer to the scheme.	N/A.

The receiving scheme's investments	
Full names of the scheme's investment providers.	N/A
What have you been told about the receiving scheme's investments and its investment policy?	N/A
After transferring, will your benefits be covered by any financial compensation scheme to protect your investment in the event the scheme or those responsible for managing it encounter financial difficulties? <small>Note: for example, your pension savings with Royal London are covered by the Financial Services Compensation Scheme (www.fscs.org.uk)</small>	N/A
Have you been advised that your pension fund will be invested overseas?	No.
Have you been promised a specific/guaranteed rate of return? If so please confirm what that rate is.	No.

Advice and costs	
Were you given advice about this transfer? If so please provide the full name, address and FCA registration number of the person giving you advice.	KB L00002
Are you aware of the costs and fees you will pay for making the transfer and the costs and fees you will pay once you are a member of the scheme, including the investment fees?	£800. + VAT PER YEAR ADMINISTRATION FEE

Finally, could you please confirm that:

1. The answers I have given to the questions above are true.
2. I understand the investment strategy and risk profile of the scheme I am transferring to and I am happy this meets my attitude to risk.

Signature



Telephone number

07773 387932

Date

08 08 2016