

**How to contact us**

W: www.vanguardinvestor.co.uk

e: Vanguard.PensionAdmin@fnz.co.uk

🖂 Vanguard

PO Box 24095

1 Tanfield

EDINBURGH

EH3 1FS

Registered Scheme Administrator

Office 12

Merthyr Tydfil

CF484DR

Our Ref: VG0480488

16 March 2022

Client name: Gillian Thorburn

Your Policy Number: 00797006RS

Dear Sir/Madam,

We are writing to advise you that the above client wishes to transfer the above pension policy to their Vanguard Personal Pension. Please find enclosed a signed letter of authority for your information.

We would be most grateful if you could complete the enclosed pension transfer questionnaire and return it along with a cash equivalent transfer value (CETV) and any discharge forms you may require to be completed, in order to proceed with the transfer.

We look forward to hearing from you, however if you require any further information, please do not hesitate to contact us on 03300586675 (Monday to Friday from 9:00am to 5:00pm), or via email at [Vanguard.PensionAdmin@fnz.co.uk](mailto:Vanguard.PensionAdmin@fnz.co.uk).

Yours faithfully,



Hayley Leslie

**Head of SIPP Administration**

**Vanguard Personal Pension**

**The Vanguard Personal Pension – Transfer Questionnaire**

**Client Name: Gillian Thorburn Our Reference: VG0480488**

**Scheme details**

Scheme Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Scheme PSTR Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Type of Scheme (eg Personal Pension, DC/DB):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is this pension an Occupational Scheme? Yes / No

**Safeguarded Benefits**

Does the policy contain any Safeguarded Benefits? Yes / No

If yes, what type of Safeguarded Benefits:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is the value of safeguarded benefits greater than £30,000: Yes / No

Does the policy contain any guarantees that are not deemed as safeguarded benefits (eg With-profits, Guaranteed Investment Return)?

Yes / No

If yes, what type of guarantees:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Scheme Member Protections**

Does the client have a protected pension age? Yes / No

Is the client entitled to scheme specific protected tax free cash? Yes / No

**Pension Divorce**

Is the client/plan subject to any court orders (pension sharing /earmarking order)? Yes / No

If yes, please provide further information:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Bankruptcy Order**

Is the client subject to a bankruptcy order? Yes / No

If yes please provide further information:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Pension Drawdown**

Does the policy contain any drawdown benefits? Yes / No

If yes, please confirm the type of drawdown: Flexi Access / Capped

If yes, is the policy: Fully / partially crystallised

Does the policy contain any pre A-day drawdown benefits: Yes / No

Completed by the scheme administrator of the ………………………………………………………...(scheme name)

Name:…………………………..................... Signature:……………………………………… Date: / /