

Transfer out information request and declaration

Policyholder name: Mr William Hugh Murray

Plan number: 8254814

Receiving scheme name: TJM Retirement Plan

Please provide the information listed below to enable us to assess whether or not you have provided a valid transfer request. In some instances you will need to ask the receiving scheme for the information:

Description of information required	Please tick to confirm you have enclosed the information or provide reason why not available.
A copy of any promotional materials, e-mails and letters you have received in relation to the receiving scheme.	
A copy of the letter from Her Majesty's Revenue & Customs (HMRC) confirming the schemes' registered status and PSTR number.	
A copy of the online printout from the Pensions Regulator that confirms the scheme has been registered with them and shows the schemes PSR number. If the scheme is not registered please provide the reason why.	
A copy of the scheme's trust deed and rules.	
Full names of the receiving scheme's investment providers	
The full name and address of the company responsible for administering the scheme.	
A copy of the scheme's policy on the payment of benefits to members and their dependants.	
A copy of the basic information about the scheme that has been provided to you as a member of the receiving scheme. This is often in the form of a scheme or membership booklet or Key Features.	
Full details of the employer whose scheme you want to transfer to - company name, registered address, company registration number on letter headed paper and nature of business.	
Proof that you are employed by the employer whose pension scheme you are transferring to, e.g. payslip with employer's name included, contract of employment. If you are not employed by the employer whose pension scheme you are transferring to, please advise what connection you have to the scheme and the reasons why you want to transfer to the scheme.	
Is the scheme to which you are transferring a SIPP? If so, please provide the name and address of the SIPP operator.	
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.	