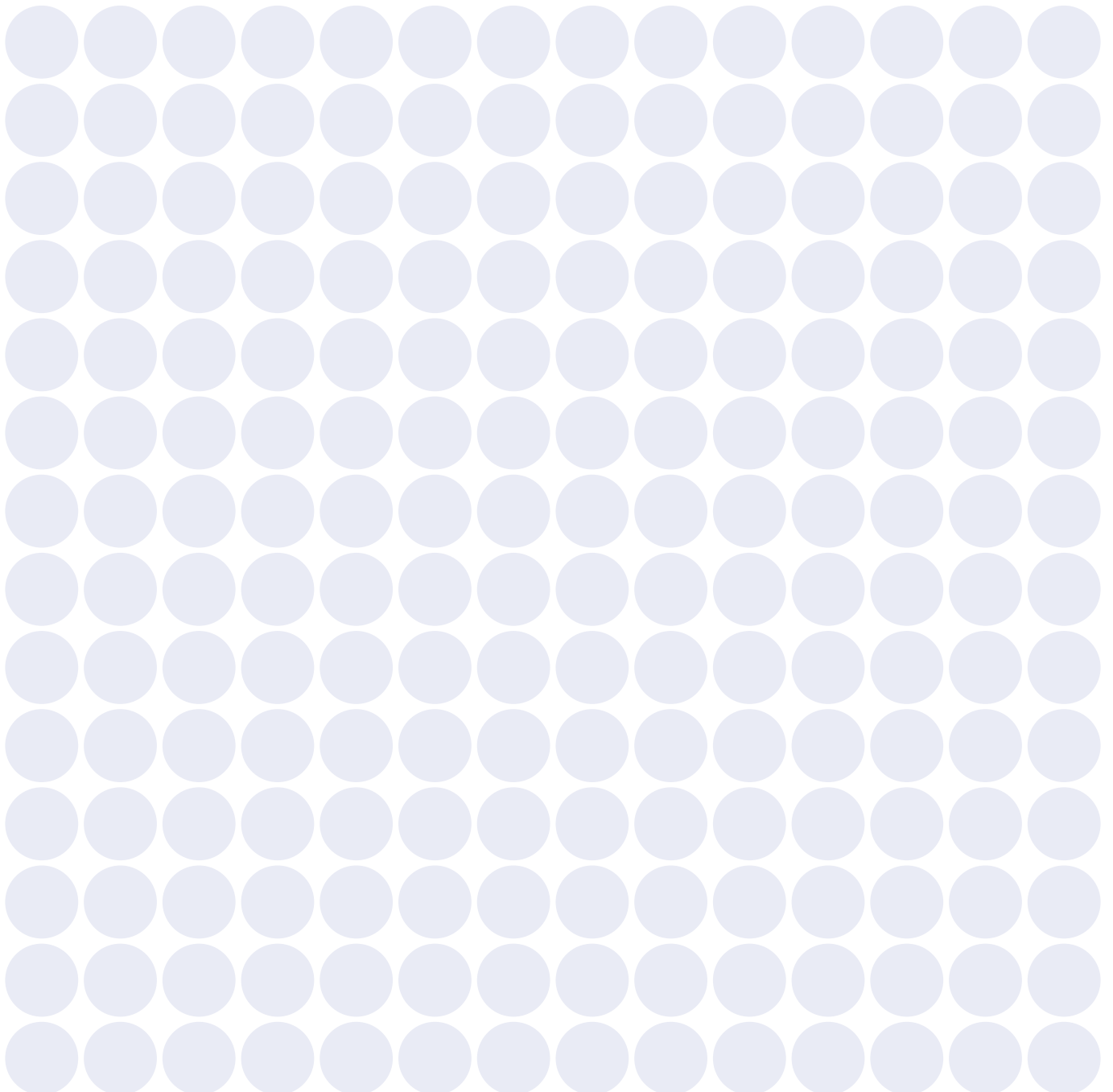


# Transfer out form

Retirement Account



## PART A – to be completed by the transferring account holder

### 1 Account holder details

Name Ian David Gough-Williams

Account number ZR1073861

### 2 Please confirm that you want to either:

- a) transfer the full value of your account ☒
- or
- b) transfer part of your account value ☐

If you choose to transfer only part of your account value, please confirm how much you want to transfer

£

Note, if you choose to transfer only part of your account, your adviser will arrange to sell assets up to the value that you want to transfer.

### 3 Details of the receiving scheme

Please note that, for the receiving scheme to accept the transfer, the account holder must be either a member of the receiving scheme, with the transfer being invested for the account holder, or the receiving scheme is the account holder's own policy.

Name of receiving scheme ZICO OTS Ltd Pension Scheme

Address 12 Hamhaugh Island, Shepperton

Postcode TW17 9LP

Reference N/A

Contact name Ian David Gough-Williams

### 4 Declaration

I authorise Sterling ISA Managers Limited, trading as Zurich ('Zurich') to calculate the final transfer value and to pay the account proceeds in accordance with the scheme rules and as detailed in this claim form and any other supporting documentation.

I authorise Zurich to provide the receiving scheme administrators or trustees with any information, written or non-written, concerning the transfer of the proceeds from my account and to accept any instructions from them relating to the transfer.

I am aware that by transferring, any protected tax free lump sum entitlement may be lost.

By signing this authority I accept that payment by Zurich is in full and final settlement of the claim.

I confirm that I am not bankrupt, nor have I been a bankrupt at any time since the plan started.

To the best of my knowledge and belief all the details Zurich hold about me and the contents of this claim form are true and complete.

Signature

Date

D

D

M

M

Y

Y

Y

Y

Name in BLOCK CAPITALS Ian David Gough-Williams

**Note:** When you have completed Part A, please forward the form to the receiving scheme to complete Part B. They should return the form to us.

## PART A – to be completed by the transferring member (continued)

### 5 Transferring scheme/account holder details

Name of transferring scheme/arrangement

Account number ZR1073861

Account holder's name Ian David Gough-Williams

National Insurance Number W K 8 9 2 6 5 6 A

Account holder's date of birth 1 4 0 7 1 9 6 0

The transferring scheme is: a UK Registered Pension Scheme ☒

## PART B – To be completed by the receiving scheme trustees or administrator

### Receiving Scheme/Policy Declaration

#### Receiving scheme details

Name of receiving scheme/provider ZICO OTS Ltd Pension Scheme

Our reference: to be used on all correspondence and payments I D Gough-Williams

Direct Credit details, Sort Code 23-83-96

Bank account number 04919088

Bank account payee name ZICO OTS Ltd Pension Scheme

Bank account name and address Allied Irish Bank (GB)

Manchester Business Centre, Vantage Point, Hardman Street, Spinningfields  
Manchester

Postcode M3 3PL

Reference to be included: (i.e. policy no. or client name) I D Gough-Williams

1. We undertake that the Receiving Scheme is: *please tick one only*

A. Registered Defined Benefit Occupational Pension Scheme ☐

B. Registered Defined Contribution Occupational Pension Scheme ☒

C. Individual Personal Pension Scheme ☐

2. Receiving scheme Pension Scheme Tax Reference (PSTR) number 20000817RJ

**PART B – To be completed by the receiving scheme trustees or administrator (continued)**

**Receiving scheme declaration**

- (a) We declare that the information given above and overleaf is true and correct.
- (b) We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with HM Revenue and Customs conditions of approval.

Signature

Company name    N/A

Position    **Scheme Administrator and Trustee**

Date

When completed and signed, please send to:

Zurich Portfolio Team  
PO Box 1200  
Bishops Cleeve  
Cheltenham  
GL50 9UP