AJBell Investcentre

SIPP transfer-out discharge form

This form is your authority to transfer your AJ Bell Investcentre SIPP to another UK-registered pension scheme in cash or in specie (i.e. the transfer of your existing assets and cash).

You must complete all relevant sections of the form and send it to the receiving scheme for completion and countersignature. Once completed, the original form must be returned to **AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE**.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 83 99 060 or email us at enquiry@investcentre.co.uk.

Customer's full name	Roger Gallagher

SIPP reference number **SCC** 882367

Please describe your reasons for transferring your pension from us.

Consolidation of my pension and to allow greater flexibility of pension investments. This was discussed as part of an overall discussion of our finances with my financial adviser.

Please also tick the box(es) which most closely match your reasons for transferring your pension from us.

Cost [ ]   Preferred provider [ ]   Consolidation [✓]   Greater flexibility [✓]   Investment range [ ]   Service [ ]

Have you received professional advice in relation to this transfer?   Yes [ ]   No [ ]

If you have received advice, please provide details of the adviser who gave it to you.

Adviser's name	NSL Wealth Management, Paul Lesner DipFA, CeMAP, CeRER, MLIBF
Address	5 High Street, Bushey, Hertfordshire
Postcode	WD23 1QD
Telephone number	020 8420 4070

Type of transfer

How do you wish to transfer your assets?   Cash only [✓]   In specie transfer (transferring cash and existing assets) [ ]

Full/partial transfer

How much do you wish to transfer?   All of my fund [✓] or Amount   £

Method of payment for cash transfer*:

BACS – three to five working days (no additional charge) [✓]

CHAPS – same day payment (£25 + VAT additional charge) [ ]

*If no method of payment is chosen, we will make the transfer payment by BACS transfer.

Customer's declaration

I hereby request that you transfer the amount specified above from the benefits to which I am entitled, and pay the transfer value to the receiving scheme stated below.

I declare that I am legally entitled to the benefits in question. I agree that payment by you in accordance with these instructions will fully discharge AJ Bell Management Limited and Sippdeal Trustees Limited from liability to provide benefits for me from the scheme, and I indemnify you against all claims or proceedings made against you in respect of the benefits to be transferred, and against all resulting losses and expenses which you may incur.

I confirm that neither I nor any party connected with me will be in receipt of any payment as a result of this transfer and its subsequent investment other than authorised pension and lump sum benefits, payable to me no earlier than from age 55.

In consideration of you processing the above transfer in reliance on the confirmation provided in the immediately preceding paragraph, I agree to indemnify you upon request against any scheme sanction charges or other tax charges imposed on you by HM Revenue and Customs (HMRC) and all related interest and penalties, plus any reasonable legal and other reasonable professional costs and expenses you suffer or incur, as a consequence of the receipt by me or any party connected with me as a result of the transfer and its subsequent investment of any payment (including without limitation any loan) which is not an authorised pension or lump sum benefit which is permitted to be made under HMRC rules.

Signed by the customer in his/her capacity as member of the arrangement, or if a child SIPP signed by the legal guardian in his/her capacity as legal guardian of the member of the arrangement.

Customer's name	Roger Gallagher
	Date 8-2-2021

Customer's signature

To be completed by the receiving scheme

Customer's full name

I/We agree to accept the transfer payment from the above arrangement and confirm the receiving scheme is a registered pension scheme under Chapter 2 Part 4 Finance Act 2004.

Full name of receiving scheme

Account number

HMRC pension scheme tax reference

Scheme administrator's name

Address

	Postcode

Telephone number

Type of scheme (please select):

SIPP/personal pension	☐	Occupational scheme - SSAS	☐	Occupational scheme - non SSAS	☐

Other (please specify)

For occupational schemes, please complete this section

The Pensions Regulator reference number

Sponsoring employer(s) name(s)

Company number(s)

Company registered address

	Postcode

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Please confirm the employer's relationship with the customer

Is the customer also a trustee?   Yes ☐ (If yes, please provide a copy of the deed of appointment)   No ☐

Name of the regulated investment service provider for the scheme

FCA number of the above regulated investment service provider

For SIPPs or other non-occupational schemes, please complete this section

Scheme administrator's name

Administrator's address

| | Postcode |

FCA number

If the customer has requested an in specie transfer, please complete the following:

Stockbroker's details

Stockbroker's name

Address

| | Postcode |

Telephone number

Account number/reference

Scheme administrator's bank details

The transfer payment will be paid directly to the scheme administrator's bank (please note that it is not possible to issue a cheque).

For security purposes we may call to confirm the bank account details:

Name of bank/building society

Account name

| Account number | Sort code |

Account in the name of

Reference to be quoted

Receiving scheme declaration (to be completed in all instances)

| Signature | | (Authorised signatory of the receiving scheme) |

| Position | Print name |

Date