

Transfer out discharge form

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

Once completed, you can scan a copy of your form to help@ajbell.co.uk. Alternatively, please return the form to us at the address below.

AJ Bell
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 in audio format, please contact us on 0345 54 32 600 or by email at help@ajbell.co.uk.

Transferring customer instructions

Customer's full name NICOLE BALLANTYNE

AJ Bell SIPP account number AB75WVS

Please describe your reasons for transferring your pension from us.

I'm taking some of my SIPP into my SSAS so that I can invest it in another way.

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 professional advice in relation to this transfer, please provide details of the adviser who gave it to you.

Name PAUL BARRY PAUL@SSAS-CONSULTANT.CO.UK

Address

Macfarlane Harris Ltd
44/46 Marmyrie Rd
Edinburgh

Postcode

EH10 4BF

Telephone number

07796 304477

Are you aged 50 or over and plan on accessing your pension once you have transferred to your new pension provider?

Yes

No

If you have answered 'yes' to the above question, please complete the section 'Getting help on your options' below.

Getting help on your options

Your pension is important, and how you access it is a big decision. That's why we suggest you seek professional advice or guidance to help you find the option that works best for you.



Did you know you can get free, impartial guidance from government service Pension Wise? One of their independent pension specialists can talk you through your pension options to help you make a more informed decision. To book an appointment, visit moneyhelper.org.uk/nudge-public, call 0800 100 166, or get in touch with us at ajbell.co.uk/can-we-help and we can book an appointment for you.

If you prefer, you can choose to pay for pension advice from an FCA-regulated financial adviser. Have you received guidance from Pension Wise?

Yes

Please enter the date of your Pension Wise appointment

You cannot continue to transfer out your pension until you have attended your Pension Wise appointment

No

Please read and confirm the declaration below

I've read the information above and do not wish to receive guidance from Pension Wise

If you'd like an appointment, it's easy to book one online by visiting moneyhelper.org.uk/nudge-public, or by calling 0800 100 166. Want us to book your appointment for you? Just get in touch with us at ajbell.co.uk/can-we-help.

Have you received advice from a regulated financial adviser?

Yes

No

If your personal circumstances or your SIPP's value have changed significantly since you spoke to an adviser or Pension Wise, you may need to consider getting new advice or guidance.

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 £ 150,000

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.

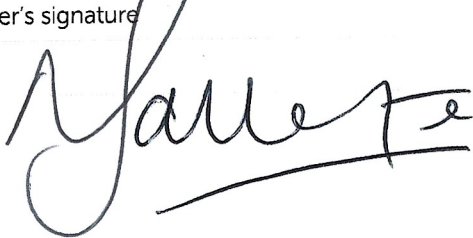
Customer's name

NICOLE BAZZANTYNE

Date

18/9/2023

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 state)

For occupational schemes, please complete this section

The Pensions Regulator reference number

Sponsoring employer(s) name(s)

Company number(s)

Company registered address

Postcode

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

What is the name of the regulated investment service provider for the scheme?

FCA number for regulated investment service provider named above

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

Scheme administrator's name

Administrator's address

Postcode

FCA number