

Self Invested Personal Pension Transfer Certificate

Drawdown to Drawdown Transfer Certificate



SLSIP32A 0810

Filling in this form

Before we can accept a transfer payment of Unsecured Pension or Alternatively Secured Pension, we need to know the answers to the questions asked in this certificate. The scheme administrator of the transferring scheme can either complete this certificate or provide the answers to us in writing.

Unsecured Pension is the name for income drawdown before age 75 and Alternatively Secured Pension used to be the name for all income drawdown on or after age 75. But if an individual turns 75 on or after 22 June 2010, they have an Unsecured Pension until their 77th birthday.

Part 1 – Member's details

Title (Mr/Mrs/Miss/Ms/Other e.g. Dr/Rev)	<input type="text"/>	Date of Birth (DD/MM/YYYY)	<input type="text"/>
Surname	<input type="text"/>	First Name(s)	<input type="text"/>
National Insurance No.	<input type="text"/>	Plan Number	<input type="text" value="D 1"/>

Part 2 – Transferring scheme

Name of scheme	<input type="text"/>	Scheme administrator	<input type="text"/>
Address of scheme administrator			
<input type="text"/>			<input type="text"/>
<input type="text"/>			<input type="text"/>
Telephone number of scheme administrator (include area dialling code)			Email address
<input type="text"/>			<input type="text"/>

Where to go next:

Complete Parts 3 & 5 if:

- the member is under age 75, or
- the member is aged 75 or 76 but was born on or after 22 June 1935.

Complete Parts 4 & 5 if:

- the member is aged 77 or older, or
- the member is aged 75 or 76 and was born before 22 June 1935.

Part 3 – Unsecured Pension Fund (continued)

Section B – Post 5 April 2006 income drawdown

If the Unsecured Pension Fund includes protected rights and non-protected rights that share the same review date but belong to separate arrangements, please complete a separate table for the protected rights.

Does more than one review date apply to the income drawdown fund created after 5 April 2006?

Yes No

If Yes, complete a separate table for each part of the Unsecured Pension Fund to which a different review date applies. If there are more than two review dates, please photocopy this page and, when complete, attach it to this certificate.

If No, just complete table 1.

Table 1

1. Current value of the Unsecured Pension Fund to which this table applies		£	
2. How much of this is protected rights?	None <input type="checkbox"/> All <input type="checkbox"/>		£
3. Is this a dependant's fund?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)			
(b) the date of death of the original member (DD/MM/YYYY)			
4. When is the next five-yearly review date? (DD/MM/YYYY)			
5. When does the next income year start? (DD/MM/YYYY)			
6. What is the current maximum income?		£	
7. How much gross income have you already paid out in this income year?		£	
8. What is the maximum income for the next income year?		£	
9. What was the value of the Unsecured Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase.)		£	
10. How much of the Lifetime Allowance was used up by:			
(a) the fund designated for Unsecured Pension			%
(b) the associated tax-free lump sum			%

Part 3 – Unsecured Pension Fund (continued)

Table 2

1. Current value of the Unsecured Pension Fund to which this table applies	£	
2. How much of this is protected rights? None <input type="checkbox"/> All <input type="checkbox"/>	£	
3. Is this a dependant’s fund?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)		
(b) the date of death of the original member (DD/MM/YYYY)		
4. When is the next five-yearly review date? (DD/MM/YYYY)		
5. When does the next income year start? (DD/MM/YYYY)		
6. What is the current maximum income?	£	
7. How much gross income have you already paid out in this income year?	£	
8. What is the maximum income for the next income year?	£	
9. What was the value of the Unsecured Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase.)	£	
10. How much of the Lifetime Allowance was used up by:		
(a) the fund designated for Unsecured Pension		
(b) the associated tax-free lump sum		

If the Alternatively Secured Pension Fund includes protected rights and non-protected rights that share the same review date but belong to separate arrangements, please complete a separate table for the protected rights.

Part 4 – Alternatively Secured Pension Fund

Does more than one review date apply to the Alternatively Secured Pension Fund? Yes No

If Yes, complete a separate section for each part of the Alternatively Secured Pension Fund to which a different review date applies. If there are more than two review dates, please photocopy this page and, when complete, attach it to this certificate.

If no, just complete section A.

Section A

1. Current value of the Alternatively Secured Pension Fund to which this section applies. £

2. How much of this is protected rights? None All £

3. Is this a dependant’s fund? Yes No

If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)

(b) the date of death of the original member (DD/MM/YYYY)

4. When does the next income year start? (DD/MM/YYYY)

5. What is the current maximum income? £

6. What is the current minimum income? £

7. How much gross income have you already paid out in this income year? £

8. If income drawdown started after 5 April 2006, how much of the Lifetime Allowance was used up by:
 - (a) the fund designated for Alternatively Secured Pension %
 - (b) the fund previously designated for Unsecured Pension %
 - (c) the associated tax-free lump sum %

Part 4 – Alternatively Secured Pension Fund

Section B

1. Current value of the Alternatively Secured Pension Fund to which this section applies. £

2. How much of this is protected rights? None All £

3. Is this a dependant's fund? Yes No

If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)

(b) the date of death of the original member (DD/MM/YYYY)

4. When does the next income year start? (DD/MM/YYYY)

5. What is the current maximum income? £

6. What is the current minimum income? £

7. How much gross income have you already paid out in this income year? £

8. If income drawdown started after 5 April 2006, how much of the Lifetime Allowance was used up by:

(a) the fund designated for Alternatively Secured Pension %

(b) the fund previously designated for Unsecured Pension %

(c) the associated tax-free lump sum %

Part 5 – Declaration by scheme administrator

I declare that the information in this certificate is correct and complete.

Signature

Date (DD/MM/YYYY)

Name

Position