

The OneSIPP Additional Transfer Information Form

Important: This form is to be used in conjunction with a **new** OneSIPP application. If you wish to transfer to an existing OneSIPP, please contact us so we can send you the relevant form for completion.

Title (Mr/Mrs/Miss/Ms/other)	<input type="text"/>	Surname	<input type="text"/>
Forename(s) (in full)	<input type="text"/>		
	<input type="text"/>	Date of birth	<input type="text"/>

Transfer payment details

If your transfer payment is £30,000 or more, and you are transferring safeguarded benefits, which include transfers from a defined benefit or final salary pension scheme, you must take financial advice before proceeding. We will not accept the transfer payment unless you have received advice and a positive recommendation to transfer.

Full name of the current provider	<input type="text"/>		
Full name of pension scheme where known	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Existing plan number	<input type="text"/>		
Approximate fund value to be paid to Sanlam Investments and Pensions			£ <input type="text"/>

Is this transfer from a Defined Benefit Scheme or a scheme with safeguarded benefits, other guarantees or promises? Yes No

In a defined benefit/final salary scheme you are promised a certain level of pension at retirement, which may increase both before and after it comes into payment. If you proceed with the transfer, you will give up all rights to any guarantees to benefits under the transferring scheme, including any death benefits which may have been available under that scheme. Once you have transferred rights out of your existing pension scheme, you will not be able to transfer back.

Does this represent the full value of the pension plan? Yes No

Have any benefits commenced from the scheme? Yes No

Have you been granted protection from the lifetime allowance charge by HMRC? Yes No

If yes, please provide a copy of your certificate if you have one, or provide your HMRC reference numbers.

<input type="text"/>	<input type="text"/>
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More information on this can be found at www.gov.uk/guidance/pension-schemes-protect-your-lifetime-allowance#check-your-existing-protection

It is unlikely you will lose protection from the lifetime allowance charge, unless this transfer is not a permitted transfer. If you want further information about this, you should consult the trustees or administrator of the transferring scheme or your Financial Adviser.

Please refer to our factsheet entitled 'Pension Scheme Allowances & Tax Charges' for more information on the protection regimes available.

Is this transfer part of a Block Transfer?

Yes No

If you have not yet started to take benefits you may lose protected tax-free cash (pension commencement lump sum), and/or entitlement to take your benefits from an age earlier than 55 unless this transfer is part of a block transfer. If you want further information about this, you should consult the trustees or administrator of the transferring scheme or your Financial Adviser.

Have the benefits been subject to a pension sharing order on divorce, nullity of marriage or dissolution of a civil partnership?

Yes No

Does any of the transfer represent a pension credit or credits as a consequence of a pension-sharing order on divorce or nullity of marriage or the dissolving of a civil partnership?

Yes No

Is the transfer subject to an earmarking/attachment order?

Yes No

If any benefits have been earmarked we will not accept the transfer without a copy of the stamped Court Order and, where necessary, confirmation that the ex-spouse or ex-civil partner has consented to the transfer.

Assets to be transferred

Will the transfer payment be comprised entirely of cash?

Yes No

Please note, if you select the Model Portfolio Service or the Pinnacle Range of funds in Section 4 of your OneSIPP Application Form, we will only accept a transfer payment comprised of cash.

Where the transfer includes assets other than cash, please call us on 0117 975 2388 to discuss the transfer.

Does the transfer include commercial property?

Yes No

If yes, please call us on 0117 975 2388. We will send you a Commercial Property Application Form.

Your declaration to the current provider

I authorise and instruct you to transfer funds from the plan(s) as listed in this form directly to Sanlam Investments and Pensions. Where you have asked me to give you any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan.

I authorise you to release all necessary information to Sanlam Investments and Pensions to enable the transfer of funds to Sanlam Investments and Pensions.

I authorise you to obtain from and release to the Financial Adviser named in the main application, any additional information that may be required to enable the transfer of funds.

If an employer is paying contributions to any of the plans as listed in this form, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s).

Until this application is accepted and complete, Sanlam Investments and Pensions' responsibility is limited to the return of the total payment(s) to the current provider.

Where the payment(s) made to Sanlam Investments and Pensions represent(s) all of the funds under the plan(s) listed in this form, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from the plan(s) listed.

Where the payment(s) made to Sanlam Investments and Pensions represent(s) part of the funds under the plan(s) listed in this form, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from that part of the plan(s) represented by the payment(s).

I promise to accept responsibility in respect of any claims, losses and expenses that Sanlam Investments and Pensions and the current provider may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

If I have taken benefits from any pension arrangement, with the current or any other pension provider, in a way which means I am subject to the Money Purchase Annual Allowance (MPAA), I have supplied the date the MPAA first applied to me in the main application.

I understand that this does not prevent me from bringing a claim against Sanlam Investments and Pensions, in the event that any act or omission by them is established.

I also affirm my agreement to all the declarations in the accompanying application form.

Applicant's signature

Date



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