



## Transferring Scheme Information (Personal Pension, Income Drawdown with SIPP Option)

Please use black ink and write in CAPITAL LETTERS or tick  as appropriate. Any corrections must be initialled. Please do not use correction fluid as this will invalidate your form.

### About this form

If you have any questions about this form, you can call us on **0808 234 0808** between 8:30am and 6pm Monday – Friday. Calls may be monitored or recorded for quality and security purposes.

Please return all 4 pages of this form in the enclosed reply paid envelope to: **Prudential, Stirling FK9 4UE**

### Part 1 – Client details

Name

Address

Postcode

Date of birth

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Plan reference number

### Part 2 – Details of transferring arrangement

Full name of scheme/arrangement

HM Revenue and Customs Reference number

Address

Postcode

Where is the transfer coming from?

UK Scheme Transfers

Occupational Scheme

S32 with GMP

Other

If Other, please give full details – evidence of approval may be required.

OR

Overseas Scheme Transfer

Please tick the appropriate box.

If Other, please give full details – evidence of approval may be required.

Further information may be required for transfers from overseas schemes.

## Part 2 – Details of transferring arrangement – continued

Is the transfer a result of a divorce "pensions splitting" order? Yes  No

If the pension being shared is a pension in payment please let us know the amount of the transfer value from which no further tax free cash may be taken.

## Part 3 – Transfer details

Total amount of transfer value

Are there any crystallised rights included in the transfer value? If **Yes**, please also complete the "Information for Drawdown to Drawdown Transfer" section. Yes  No

Is any part of the transfer uncrystallised rights that originated in an approved occupational pension scheme where, on or after 27 July 2004 but before 6 April 2006, the applicant took a tax-free lump sum but delayed taking pension? Yes  No

If **Yes**, and this does not apply to the whole transfer value, please confirm the value that has already attracted tax-free cash.

Is the transfer part of a block transfer from a registered pension scheme? Yes  No

**Note:** If the member has been a member of our scheme for more than 12 months we will ignore any details given below.

Does the investor qualify for Protected Tax-Free Cash for pre 6 April 2006? Yes  No

Does the investor have a Protected Early Pension Age? Yes  No

If **Yes**, to either of the protection questions above please complete the rest of this section.

If **No**, please go to Drawdown to Drawdown section overleaf if required, or direct to the declaration on page 4.

Protected Tax-Free Cash amount at 5 April 2006

Fund value at 5 April 2006

Protected Early Pension Date (this date must be a birthday)

Does the Transfer Value include the value of any contributions paid, or benefits earned, after 5 April 2006? Yes  No

Has there been a previous partial transfer out from the scheme Yes  No

If **Yes**, value of previous transfer out

Are all benefits available from the scheme payable as a Standalone Lump Sum? Yes  No

## Part 3 – Transfer details – continued

### Information for drawdown to drawdown transfers

Does the transfer payment include Income Drawdown Funds with:

› Different GAD review dates? Yes  No

› Pre and post 6 April 2006 drawdown? Yes  No

If the answers to any of the above are **Yes**, we need the details of each fund separately.

Transfer Value of Income Drawdown Fund

Were funds already in drawdown at 6 April 2006? Yes  No

When was the last GAD review?

Gilt Yield used at last GAD review  %

Current Maximum Income (max GAD)

Will the current maximum change at the start of the new GAD year as a result of part annuitisation or pension sharing? Yes  No

If **Yes**, what will the new limit be?  gross

Total amount withdrawn in the current GAD year  gross

Value of fund at date funds were first moved to drawdown

*(If funds were phased show the total of the fund values when they were moved into drawdown).*

If the funds were moved to drawdown after 5 April 2006, what is the percentage of total standard Lifetime Allowance used by all BCEs connected to the transfer value quoted in this section  %

Does the member have any short term annuity contracts currently in payment from the unsecured pension fund? Yes  No

*If Yes, we will contact you for further details.*

## Declaration and certification from transferring arrangement

1. We declare that to the best of our knowledge and belief the information given in all parts of this application is correct and complete.
2. We confirm that the transfer value detailed in this form is consistent with UK legislation and meets the requirements for equal treatment of retirement benefits between males and females in the same category of employment to the extent required by the Treaty of Rome.
3. If the transfer value is subject to a Court Order following the Investor's divorce (an "earmarking order"), a copy of this Order is attached.

copy attached

Signature

Date

D	D	M	M	Y	Y	Y	Y
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For and on behalf of the administrator of the transferring scheme or the insurer of the transferring arrangement or contract.

The Prudential (SAL) Personal Pension Scheme is an appropriate personal pension scheme and has been allocated HMRC pension scheme tax reference number 00605330RK and ASCN A7001074K.



[www.pru.co.uk](http://www.pru.co.uk)

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