

SUPPLEMENTARY FORM FOR ADDITIONAL PENSION TRANSFERS

Please provide details of all pension scheme transfers you wish IFGL Pensions to receive. For multiple transfers each scheme will require all pages completed in full with a declaration signed by the applicant for each transfer.

Full name of the current provider:

Full name of the current scheme:

Current scheme administrator address:

Current scheme administrator email address:

Current scheme administrator phone number:

Type of scheme: Defined benefit Defined contribution
 Personal pension Other

Current scheme/plan/policy/member number:

Approximate fund value to be paid to IFGL Pensions: £

Does this represent the full value of the current scheme/plan? Yes No

Guarantee date of the transfer (if applicable): (dd/mm/yyyy)

Are the sums and assets being transferred:

Already entirely in drawdown? Yes No Other

Already partially in drawdown? Yes No Other

Not in drawdown? Yes No Other

Drawdown details:

- I am transferring a fully uncrystallised arrangement: Yes No
- I am transferring a capped drawdown arrangement which I want to remain in capped drawdown: Yes No
- I am transferring a capped drawdown arrangement which I want to convert to flexi-access drawdown: Yes No
- I am transferring an arrangement already in flexi-access drawdown: Yes No
- Have you triggered the Money Purchase Annual Allowance (MPAA)? Yes No
- Is the current scheme or plan subject to any existing or proposed trustee in bankruptcy orders, or earmarking or pension sharing orders, or other receiving orders? Yes No
- Is the transfer to be made from the current scheme/plan as assets in specie? Yes No
- If so, please provide a current valuation including details of the assets held so that IFGL Pensions can confirm whether or not these assets can be accepted. Do not proceed without this confirmation. Yes No
- Have you been advised against proceeding with a transfer out from the above pension scheme but want to transfer out regardless? Yes No
- Where the current provider's scheme contains any defined or safeguarded benefits, please confirm whether you have received pension transfer advice from a UK regulated financial adviser in relation to the transfer out of the above pension scheme: Yes No

Full name of the current provider:

Current scheme/plan/policy/member number:

If the above pension scheme contains any defined or safeguarded benefits above £30,000 IFGL Pensions will not accept the transfer unless you have taken UK regulated pension transfer advice. If applicable, please provide the details of the adviser who has provided the appropriate transfer advice.

Company name:

FCA firm reference number:

Adviser name:

FCA adviser reference number:

Business address:

Email:

Telephone:

THE PENSION WISE SERVICE - DEFINED CONTRIBUTION PENSION TRANSFER ONLY

The FCA require us to make you aware of a service called Pension Wise.

Pension Wise is a government backed service which offers free and impartial pension guidance to help anyone over the age of 50 understand their options for accessing their pension savings from age 55 onwards. Pension Wise guidance can be delivered by phone, face to face, or through another electronic medium. During the appointment, you will receive pensions guidance with an independent pension specialist. They will talk you through your options to help you make an informed decision. Accessing your pension benefits will be one of the most important financial decisions you make in your lifetime, so it is important to be fully informed. You can choose to book yourself, or we at IFGL Pensions can arrange this for you. You also have the option of taking advice from a UK FCA regulated financial adviser at your own cost.

To date, customer satisfaction with the Pension Wise service has been very high, with 94% of those surveyed in 2019-20 saying they were "very or fairly satisfied with their overall experience". 91% felt it helped them consider their options more thoroughly and 97% would recommend the service to others.

Pension Wise Eligibility

Please tick one of the four options below:

- I am under age 50, transferring a pension in my own right, and currently in good health
If selected, no further action required
- I am aged 50 or older and do not plan on taking benefits from my SIPP once the pension transfer is complete
If selected, no further action required
- I am aged 50 or older and planning on taking benefits from my SIPP once the pension transfer is complete
If selected, please proceed to 'Pension Wise Appointment'
- The pension I am transferring is already in drawdown
If selected, please proceed to 'Pension Wise Appointment'

Pension Wise Appointment

- I have booked a Pension Wise appointment myself

Website: <https://www.moneyhelper.org.uk/en/pensions-and-retirement/pension-wise/book-a-free-pension-wise-appointment>

Telephone: 0800 138 3944

Pension Wise appointment date (dd/mm/yyyy):

- I want IFGL Pensions to book a Pension Wise appointment for me

Please provide details of when you can attend a Pension Wise appointment:

Day:

Time:

Memorable word for Pension Wise to confirm at the start of the appointment:

Telephone number:

- I want to 'Opt out' of the Pension Wise appointment

TRANSFER DECLARATION

Note: This declaration is your instruction to your above named current scheme provider to transfer to IFGL Pensions the pension fund for which you have provided these details. For your own benefit and protection you should read this Declaration carefully before agreeing and signing it. If you do not understand any point, please refer to your current scheme provider or financial adviser for guidance.

I hereby declare and acknowledge as follows:

1. I authorise and instruct you, my current scheme provider, to transfer sums and assets from the pension scheme detailed in this section directly to IFG Pensions Limited and to provide any instruction and/or discharge required by any relevant third party to do so.
2. I authorise IFG Pensions Limited, my current scheme provider and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to the Scheme Trustee.
3. I authorise IFG Pensions Limited, my current scheme provider and any employer paying contributions to any of the schemes as listed in this section of this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to the Scheme Trustee.
4. Until this application is accepted and complete the responsibility of IFG Pensions Limited is limited to the return of total payment(s) to my current scheme provider.
5. When payment is made to the Scheme Trustee as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the schemes listed in this section where the whole of the schemes are transferring, or that part of the schemes represented by the payment(s) if only part of the schemes are transferring.
6. I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that IFG Pensions Limited and my current scheme provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.
7. I confirm I have not been advised regarding this transfer, or received any recommendation to transfer, by any representative of IFG Pensions Limited.

Applicant's signature:

Date (dd/mm/yyyy):