

Transfer In – Form to request transfer details

Please complete your personal details and send this form to your previous pension provider.

Details for you to complete

Name and address of previous pension provider:.....
.....
.....
..... Postcode:.....

Dear Pension Provider,

I am thinking of transferring the pension rights I have with you to a scheme administered by TPT Retirement Solutions. I have supplied my personal details below. Please provide a transfer value figure and ensure you give all the information asked for in your quotation. Send it to my home address so that I can deal with TPT direct. Do not send any payment at this stage. I will contact you again if I decide to go ahead with the transfer. Please let me know if you need either myself or TPT to sign any option forms or to see originals or copies of any of my documents.

TPT Membership Number: **M**.....

Membership Number with your previous pension provider:.....

Title: (Mr / Mrs / Miss / Ms / Other, please state):.....

Forname(s):.....

Surname:.....

Previous Surname (if any):.....

Date of Birth:.....

National Insurance Number:.....

Home Address:

Postcode:

I authorise TPT to request any other details they may need from you.

Date of previous pension scheme membership:

From:

To:

Your Signature: Date:

Details required by TPT

- 1 | What is the name of your scheme, plan or arrangement?
- 2 | What is your Pension Scheme Tax Reference Number?
- 3 | Please give a statement of the full transfer value excluding protected rights and other contracted-out liabilities.
- 4 | Please give the exact period to which the transfer value relates.
- 5 | Please confirm that the benefits covered by the transfer value are equal in accordance with the Treaty of Rome. We will only accept a transfer value if you are able to confirm that benefits have been equalised and that you will make good the deficiency if it is later established that benefits were not adequately equalised. If you need TPT to sign any discharge papers, please include them when you send your transfer details to the member. Please say if you will want any policy or other documents returned to you.

Please do not send any payment at this stage.

Notes

The Schemes administered by TPT are occupational pension schemes of the type generally known as 'defined contribution' or 'money purchase'. It is a Registered Pension Scheme for the purposes of the Finance Act 2004. The Pension Scheme Tax Reference is 00281218RV.

The Scheme can accept transfer values relating to previously contracted-out benefits.

The Scheme will only accept transfer payments from a Registered Scheme provided they comply with the Treaty of Rome regarding equalised benefits.

These two pages contain the details TPT will need. Please ensure all the questions are answered within your transfer quote. If you fail to include all the details, this will delay the transfer application.