



SSAS

SMALL SELF ADMINISTERED PENSION SCHEME

TRANSFER IN FORM

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investAcc

Pension Administration Limited



Section A: To be completed by the Scheme Member

Section B: To be completed by the Transferring Scheme Administrator / Trustees

Section A - To be completed by the Scheme Member

Scheme Name

Member:

Full Name of Member	
Address of Member	
	Postcode
National Insurance Number	Date of Birth

I wish to transfer my entitlement to benefits from the following pension scheme to the above Small Self Administered Scheme (SSAS) administered by InvestAcc Pension Administration Limited.

Full Name of Transferring Scheme	
Policy Number	Revenue Reference Number
Address of Transferring Scheme	
	Postcode
Contact Name	

I wish to transfer my uncrystallised pension arrangements

Yes No

I wish to transfer my crystallised pension arrangements

Yes No

Are any of the assets being transferred in-specie?

Yes No

If 'YES' please enclose a complete list of assets to be transferred. This should include the unit allocation/price/value of each asset. If a property is to be transferred in 'in-specie' please ensure our Property Questionnaire is completed.

Members Declaration

I hereby consent to InvestAcc Pension Administration Limited requesting the transfer of my entitlement to benefits from the above named scheme, and for InvestAcc Pension Administration Ltd to obtain relevant details from this scheme.

I understand any 'Enhanced Protection' will be lost if the transfer is not a 'permitted transfer' as defined by HMRC Legislation.

I understand that any entitlement to take lump sum rights in excess of 25% may only be retained on transfer provided the transfer is part of a block transfer as defined by HMRC Legislation. However, I understand that if this lump sum figure is over £375,000 and I have enhanced or primary protection the lump sum on these certificates will take precedence.

I understand that any low retirement age may only be retained on transfer if it is part of a block transfer as defined by HMRC Legislation.

I understand that InvestAcc Pension Administration Limited will not pay any benefits or invest the funds that are transferred until all relevant transfer information has been received.

Signed	Date
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Section B - To be completed by the Transferring Scheme Administrator / Trustees

B1 Scheme Details

Transfer Value of any Non-Protected Rights benefits:

Please note: Protected Rights benefits cannot be transferred to a SSAS

Is the transfer payment from an arrangement(s) under which the Client named in Section A is the original member?

Yes No

If 'NO' please provide the following information, if 'YES' please go to B2:

Full Name of Member	
	National Insurance Number

Pension Credit Rights

At the date of the pension sharing order were the arrangements, which are being transferred:

Uncrystallised Crystallised

Please provide a certified copy of the Court Order.

Death Benefit Entitlement

At the date of the original member's death were the arrangements which are being transferred:

Uncrystallised Crystallised

B2 Uncrystallised Arrangements

Current Value of uncrystallised arrangements:

We confirm that the transferring scheme is (please tick one):

- A registered pension scheme approved under Chapter 4 of the Finance Act 2004.
- A recognised overseas pension scheme as defined by HMRC under Chapter 4 of the Finance Act 2004, and has satisfied HMRC requirements in this respect.
- An employer financed retirement benefits scheme as defined by HMRC under Chapter 4 of the Finance Act 2004 and has satisfied HMRC requirements in this respect.

If the transferring scheme is an employer financed retirement scheme please confirm the type of scheme this was under pre A-day rules, for example FURBS, UURBS.

B3 Crystallised Arrangements

We confirm that the transferring scheme is:

- A registered pension scheme approved under Chapter 4 of the Finance Act 2004.
- If these arrangements were in income drawdown before 6 April 2006 we will convert them to unsecured pension before transfer to InvestAcc Pension Administration Limited.

P45

- The members P45 is enclosed with this form (If this document is not enclosed please forward it to InvestAcc Pension Administration Limited as soon as it is available).

Please provide the following additional information for each separate date benefits were crystallised:

Current Value of crystallised arrangements:	£
Date benefits were crystallised:*	
Value of arrangements at the date benefits were crystallised* (before any pension commencement lump sum and lifetime allowance tax charges paid):	£
Amount of pension commencement lump sum paid:	£
Percentage of Standard Lifetime allowance used:	%
If applicable, amount of lifetime allowance tax charge paid:	£
GAD rate used when benefits were crystallised: *	£
GILT Yield used when benefits were crystallised: *	£
Current amount of GAD income limit:	£
Gross amount of income paid in this benefit year:	£

* If these arrangements were in income drawdown before 6 April 2006 please advise the date the income was converted to unsecured pension, not the original date the benefits were first paid.

Was the Client claiming any of the following types of protection at the Benefit Crystallisation Event (please tick as appropriate)?

Enhanced Protection

Certificate Registration Number:

Primary Protection

Certificate Registration Number:

International

Certificate Registration Number:

Pension Credit

Certificate Registration Number:

B4 Block Transfer Information

Is the transfer part of a block transfer?

Yes No

If 'YES' please complete the following if applicable:

Protected lump sum rights

Amount of protected lump sum rights available at 5 April 2006 for the uncrystallised arrangements in Section B2

£

Fund Value at 5 April 2006:

£

Does the transfer value include any post A-day contributions?

Yes No

Protected retirement age

Does the member have a protected retirement age?

Yes No

If 'YES' please state the age that the member can begin to take benefits:

Age


Scheme Administrator / Trustees Declaration

We confirm that as Scheme Administrator/Trustee of the transferring scheme that the above statements and the information we have provided are, to the best of our knowledge, correct and complete.

Signed	Date
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Signed for, or and on behalf of, the Scheme Administrator/Trustees of the Transferring Scheme.

Address of the Transferring Scheme	
	Postcode



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InvestAcc Pension Administration Limited is authorised and regulated by the Financial Services Authority.
InvestAcc Pension Administration Limited is registered in England and Wales. Company number 7118349.
InvestAcc Pension Trustees Limited is registered in England and Wales, Company number 2875892.

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