

# Self Invested Personal Pension Transfer Certificate

Drawdown to Drawdown Transfer Certificate



SLSIP32A 808

## Filling in this form

Before we can accept a transfer payment of Unsecured Pension or Alternatively Secured Pension, we need to know the answers to the questions asked in this certificate. The scheme administrator of the transferring scheme can either complete this certificate or provide the answers to us in writing.

Unsecured Pension is the name for income drawdown before age 75 and Alternatively Secured Pension is the name for income drawdown on or after age 75.

## Part 1 Member's details

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	<input type="text"/>	Date of Birth (DD/MM/YYYY)	<input type="text"/>
Surname	<input type="text"/>	First Name(s)	<input type="text"/>
National Insurance No.	<input type="text"/>	Plan Number	<input type="text" value="D 1"/>

## Part 2 Transferring scheme

Name of scheme	<input type="text"/>	Scheme administrator	<input type="text"/>	
Address of scheme administrator				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>			Postcode	<input type="text"/>
Telephone number of scheme administrator (include area dialling code)		E-mail address		
<input type="text"/>		<input type="text"/>		

### Where to go next:

- if the member is under age 75 complete Parts 3 & 5
- if the member is aged 75 or older complete Parts 4 & 5

**Part 3 Unsecured Pension Fund**

Did the member's income drawdown start before 6 April 2006? Yes  No

**If Yes, complete section A with details of their pre 6 April 2006 income drawdown (and section B with details of any income drawdown that started after 5 April 2006).**

**If No, go straight to section B.**

**Section A – Pre 6 April 2006 income drawdown**

1. Current value of the pre 6 April 2006 income drawdown fund £

2. How much of this is protected rights? None  All  £

3. Is this a dependant's fund? Yes  No

If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)

(b) the date of death of the original member (DD/MM/YYYY)

4. When is the next five-yearly review date? (DD/MM/YYYY)

5. When does the next income year start? (DD/MM/YYYY)

6. What is the current maximum income? £

7. How much gross income have you already paid out in this income year? £

8. What is the maximum income for the next income year? £

**Part 3 Unsecured Pension Fund**

**Section B – Post 5 April 2006 income drawdown**

If the Unsecured Pension Fund includes protected rights and non-protected rights that share the same review date but belong to separate arrangements, please complete a separate table for the protected rights.

Does more than one review date apply to the income drawdown fund created after 5 April 2006?

Yes  No

**If Yes, complete a separate table for each part of the Unsecured Pension Fund to which a different review date applies. If there are more than two review dates, please photocopy this page and, when complete, attach it to this certificate.**

**If No, just complete table 1.**

**Table 1**

1. Current value of the Unsecured Pension Fund to which this table applies		£	
2. How much of this is protected rights?	None <input type="checkbox"/> All <input type="checkbox"/>	£	
3. Is this a dependant's fund?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)			<input type="text"/>
(b) the date of death of the original member (DD/MM/YYYY)			<input type="text"/>
4. When is the next five-yearly review date? (DD/MM/YYYY)			<input type="text"/>
5. When does the next income year start? (DD/MM/YYYY)			<input type="text"/>
6. What is the current maximum income?		£	<input type="text"/>
7. How much gross income have you already paid out in this income year?		£	<input type="text"/>
8. What is the maximum income for the next income year?		£	<input type="text"/>
9. What was the value of the Unsecured Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase.)		£	<input type="text"/>
10. How much of the Lifetime Allowance was used up by:			
(a) the fund designated for Unsecured Pension			<input type="text"/> %
(b) the associated tax-free lump sum			<input type="text"/> %

**Part 3 Unsecured Pension Fund**

**Table 2**

1. Current value of the Unsecured Pension Fund to which this table applies	£	
2. How much of this is protected rights?      None <input type="checkbox"/> All <input type="checkbox"/>	£	
3. Is this a dependant's fund?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)		
(b) the date of death of the original member (DD/MM/YYYY)		
4. When is the next five-yearly review date? (DD/MM/YYYY)		
5. When does the next income year start? (DD/MM/YYYY)		
6. What is the current maximum income?	£	
7. How much gross income have you already paid out in this income year?	£	
8. What is the maximum income for the next income year?	£	
9. What was the value of the Unsecured Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase.)	£	
10. How much of the Lifetime Allowance was used up by:		
(a) the fund designated for Unsecured Pension		
(b) the associated tax-free lump sum		

If the Alternatively Secured Pension Fund includes protected rights and non-protected rights that share the same review date but belong to separate arrangements, please complete a separate table for the protected rights.

**Part 4** Alternatively Secured Pension Fund

Does more than one review date apply to the Alternatively Secured Pension Fund? Yes  No

**If Yes, complete a separate section for each part of the Alternatively Secured Pension Fund to which a different review date applies. If there are more than two review dates, please photocopy this page and, when complete, attach it to this certificate.**

**If no, just complete section A.**

**Section A**

1. Current value of the Alternatively Secured Pension Fund to which this section applies. £
2. How much of this is protected rights? None  All  £
3. Is this a dependant's fund? Yes  No   
 If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)   
 (b) the date of death of the original member (DD/MM/YYYY)
4. When does the next income year start? (DD/MM/YYYY)
5. What is the current maximum income? £
6. What is the current minimum income? £
7. How much gross income have you already paid out in this income year? £
8. If income drawdown started after 5 April 2006, how much of the Lifetime Allowance was used up by:
  - (a) the fund designated for Alternatively Secured Pension  %
  - (b) the fund previously designated for Unsecured Pension  %
  - (c) the associated tax-free lump sum  %

**Part 4** Alternatively Secured Pension Fund**Section B**

1. Current value of the Alternatively Secured Pension Fund to which this section applies. £
2. How much of this is protected rights? None  All  £
3. Is this a dependant's fund? Yes  No
- If Yes, give (a) the date of birth of the original member (DD/MM/YYYY)
- (b) the date of death of the original member (DD/MM/YYYY)
4. When does the next income year start? (DD/MM/YYYY)
5. What is the current maximum income? £
6. What is the current minimum income? £
7. How much gross income have you already paid out in this income year? £
8. If income drawdown started after 5 April 2006, how much of the Lifetime Allowance was used up by:
- (a) the fund designated for Alternatively Secured Pension  %
- (b) the fund previously designated for Unsecured Pension  %
- (c) the associated tax-free lump sum  %

**Part 5** Declaration by scheme administrator

I declare that the information in this certificate is correct and complete.

Signature

Date (DD/MM/YYYY)

Name

Position