

Cash Fund Drawdown

# Transfer In Form (advised)

## Important Information

Complete this form if you wish to transfer pension benefits from other providers into your Cash Fund Drawdown. Please use a separate form for each pension plan you wish to transfer. We can accept transfers from UK registered defined contribution pension schemes. We are unable to accept transfers from overseas schemes, or pension credits arising from a divorce.

There can be advantages of transferring funds into Cash Fund Drawdown. However, you could lose valuable benefits from your existing pensions or be subject to potential penalties. It is important that you consider this before you transfer your funds. It is therefore important that you consult with your existing provider and your financial adviser to ensure a transfer is suitable for you and you have not lost any valuable guarantees.

### 1. YOUR DETAILS

Mr/Mrs/Miss/Ms/Other

Surname

Forename(s)

Permanent address

Postcode

Telephone number

### 2. PENSION DETAILS

Scheme/Pension Plan name

Plan number

Administrator's name and address

Postcode

Estimated transfer value

 £

**2. PENSION DETAILS** (continued)

Is your transfer payment subject to a Pension Sharing or Earmarking order?  Yes\*  No

\* If 'Yes' please attach a copy of the relevant court order.

Has this transfer fund already been designated into income drawdown?  Yes  No

Have you accessed any of your pension savings flexibly with another provider and triggered the Money Purchase Annual Allowance (MPAA)?  Yes\*  No

\* if you answered 'Yes', on which date did this take effect?  D  D  M  M  Y  Y  Y  Y

Your pension provider should have notified you of this, if it has occurred. The **Terms and Conditions** provide more information about the MPAA. If you require more information you can contact us or if you require advice, you should discuss with a financial adviser.

Please can you also confirm the following; Does the transfer involve crystallised or uncrystallised funds?  Crystallised  Uncrystallised

Please tick as applicable

If crystallised please insert date of crystallisation  D  D  M  M  Y  Y  Y  Y

Has an uncrystallised Funds Pension Lump Sum (UFPLS) previously been taken?  Yes  No

Please tick as applicable

**3. SIGNATURE AND DECLARATION**

I confirm that

- I have checked with my existing scheme to see if I will lose any benefits or incur any penalties by transferring.
- I have received advice and a recommendation from my financial adviser on this transfer to ensure it is appropriate for me.
- I authorise the current provider, as listed above, to give LFS any information they require about my membership of the scheme.
- I understand that any transfer payments are subject to the Personal Pension Trust Deed and Rules and that any transfers must come from a Registered Pension Scheme.
- I authorise you to transfer funds from the above scheme to a Cash Fund Drawdown Plan.
- I authorise LFS to obtain any additional information required from my financial adviser to transfer funds.

Print name (in **BLOCK CAPITALS**)

Applicant signature

Date  D  D  M  M  Y  Y  Y  Y