

Transfer request form

Read this before you start

If you are transferring from more than one scheme, you must complete a separate copy of this form for each additional scheme.



Scheme details

Full name of scheme to be transferred					
Type of scheme being transferred <i>eg PPP, EPP, SIPP, SSAS, etc</i> <i>If transferring an occupational scheme, please complete the occupational transfer declaration which can be found on our website (www.essentialstipp.com)</i>					
Estimated transfer value for:	<table border="0"> <tr> <td>Non-protected rights benefits</td> <td>£</td> </tr> <tr> <td>Protected rights benefits</td> <td>£</td> </tr> </table>	Non-protected rights benefits	£	Protected rights benefits	£
Non-protected rights benefits	£				
Protected rights benefits	£				
Details of scheme administrator / trustee / insurance company / other pension provider	Name				
	Address				
	Telephone				
Policy/account number <i>if applicable</i>					
Which of the following statements will apply at the time of the transfer to your Stadia Trustees Limited Essential SIPP? <i>If crystallised, please complete the 'Taking pensions benefits form' which can be found on our website (www.essentialstipp.com)</i>	<input type="checkbox"/> None within the scheme has begun paying benefits (uncrystallised) <input type="checkbox"/> All or some within the scheme have begun paying benefits (crystallised)				

Assets to be transferred

Please indicate which type of assets apply to your transfer	<input type="checkbox"/> Cash <input type="checkbox"/> Property <input type="checkbox"/> In-specie
Additional information	

Declaration and signature for transfers

Read these points

- I declare that, to the best of my knowledge and belief, the statements made are correct and complete.
- I understand that in line with the terms and conditions, the ceding scheme provider may charge a fee to transfer the above scheme.
- I agree to Stadia Trustees Limited obtaining details from the administrator/trustee or insurance company or other pension provider of any scheme, contract or arrangement I am or have been a member of in connection with the transfer. I authorise giving these details to Stadia Trustees Limited.
- I also agree to my adviser obtaining the same details.
- While Stadia Trustees Limited will aim to ask for transfers on time, I understand that they are not responsible for the timely completion of the transfer.
- I understand that Stadia Trustees Limited will not request any in specie transfer until all the information requested in the in specie transfer schedule has been provided and any necessary account with an investment manager or execution-only broker has been established.
- I wish for the pension scheme benefits detailed in the above sections to be transferred to my Stadia Trustees Limited Essential SIPP.

Sign and date here

Member's Name:

Member's Signature:

Date:
