

# The Lifetime SIPP

## Transfer In Authority Form

Member Name:

Scheme Number:  National Insurance No:

Please accept this form as my instruction to transfer the following pension arrangement to my Lifetime SIPP

### Transferring scheme details

Scheme Name:

Policy Number:

Address:

I wish to transfer on the following basis:

- Transfer Method:  **Cash Transfer**  
With this option your existing provider will sell your current holdings and transfer the cash proceeds. If you want to transfer your holdings intact please tick the 'in specie' option.
- In-Specie Transfer**  
Transferring an asset in-specie means transferring your underlying holdings as they are, without having to sell and repurchase them. This means you will remain invested throughout the transfer process. You should note that there will be a short period when you will not be able to sell your holdings.
- Transfer Amount:  **Full Transfer**  
With this option you will transfer the entire value of your existing pension
- Partial Transfer**  
With this option you will only transfer part of your existing pension rights from another registered pension scheme, leaving the remaining rights in your other scheme.

Please specify the amount to be transferred:   
(Required for full and partial transfers)

### Important Note

Where you are requesting an In Specie transfer it is your responsibility to check with the ceding scheme that assets can be transferred In Specie.

Type of scheme you are transferring from:  
(Please tick all that apply)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Retirement Annuity | <input type="checkbox"/> Buy Out 'S32'                  | <input type="checkbox"/> Self Invested Personal Pension    |
| <input type="checkbox"/> Statutory Scheme   | <input type="checkbox"/> Personal Pension               | <input type="checkbox"/> Defined Benefit Occupational      |
| <input type="checkbox"/> Free Standing AVC  | <input type="checkbox"/> Small Self Administered Scheme | <input type="checkbox"/> Defined Contribution Occupational |

Please confirm the following:

- I have not received any benefits from the transferring scheme
- OR
- I attach a statement of benefits I have received from the transferring scheme
- If the transfer is from a scheme with a retirement age below 55, I attach a certificate showing the retirement age
- I intend to immediately draw benefits from the proceeds of this transfer

**Please return completed form to:**

The Lifetime SIPP Company Ltd, 8th floor, 25 Marsh Street, Bristol, BS1 4AQ  
Authorised and regulated by the Financial Conduct Authority 464526 and registered in England and Wales 02455807  
T: 0117 316 9944 E: info@thelifetimesipp.com W: www.thelifetimesipp.com

Do any of the funds that you are transferring relate to pension benefits you have received from an Ex Spouse or Civil Partner on divorce or dissolution of a Civil Partnership?

Yes  No

Are the proceeds from this transfer currently subject to a bankruptcy order? (if yes please provide further information)

Yes  No

Does the transferring scheme hold any safeguarded benefits

Yes  No

If the transferring scheme is either a defined benefit or has any form of safeguarded benefits then full regulated advice will be required before the transfer can be accepted. Please refer to the transfer guidance notes for further details.

I understand that The Lifetime SIPP Company Limited may use a third party to request the transfer of the above arrangement and I give my authority for them to release any information in respect of this transfer to the appointed party.

**It is a serious offence to make false statements and doing so could lead to prosecution.**

In respect of pension arrangements made on my behalf now or at any time in the past, I hereby authorise any competent person to provide information relevant to my pension arrangements to The Lifetime SIPP Company Limited, on presentation of this letter or a facsimile of it.

Name:

Of

Address:

Address:

Address:

Post Code:

Signed:

Date:

Please note that the transfer cannot be processed unless this form is fully completed.

**Please return completed form to:**

The Lifetime SIPP Company Ltd, 8th floor, 25 Marsh Street, Bristol, BS1 4AQ

Authorised and regulated by the Financial Conduct Authority 464526 and registered in England and Wales 02455807

T: 0117 316 9944 E: info@thelifetimesipp.com W: www.thelifetimesipp.com