

Transfer in to your SIPP

Please complete the table below

Name of transferring scheme		
Name and address of Trustees, Scheme Administrator or Insurance company		
HMRC Pension Scheme Tax Reference (PSTR)		
Plan/membership number (if applicable)		
Is this a full or partial transfer?	Full <input type="checkbox"/>	Partial <input type="checkbox"/>
Total transfer payment (or estimate) If a partial transfer, please state the exact amount to be transferred	£	
If a transfer of assets in specie is intended, please list the assets here		
	Yes	No
Is the transfer from a defined benefit/ final salary scheme or does it include safeguarded benefits/guaranteed annuity rates?	<input type="checkbox"/>	<input type="checkbox"/>
Have any benefits come into payment?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, what benefit type:		
Uncrystallised funds pension lump sums (UFPLS)	<input type="checkbox"/>	<input type="checkbox"/>
Capped Drawdown?	<input type="checkbox"/>	<input type="checkbox"/>
Flexi-Access drawdown?	<input type="checkbox"/>	<input type="checkbox"/>
Date of first flexi-access/UFPLS payment. (DD/MM/YYYY)	/ /	
If benefits in payment, what percentage of the Lifetime Allowance has been crystallised?	%	
Is income to continue after transfer?	<input type="checkbox"/>	<input type="checkbox"/>
Is the transfer subject to a pension sharing order?	<input type="checkbox"/>	<input type="checkbox"/>
Does the transfer have a protected lump sum?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a protected pension age under the transferring scheme?	<input type="checkbox"/>	<input type="checkbox"/>

Please note:
Your SIPP must be established before transfers can be received. If you have multiple transfers, then please copy this page, complete as appropriate and send to us.

Please note:
We only have authority to contact relevant parties and obtain information about your transfer once you have completed and signed the Transfer Declaration.

Please note:
Before accepting a transfer from a scheme with safeguarded benefits (including defined benefit/ final salary) into a Dentons SIPP, you must have received a recommendation to transfer from a suitably qualified independent adviser. We are only able to process a transfer of safeguarded benefits when we are also in receipt of a fully completed 'Transfers from schemes offering safeguarded benefits' form and there are at least 7 working days from the date of receipt of the form to the expiry date set by the transferring scheme.

Please note:
You are NOT able to waive your cancellation rights for transfers.

Cancellation rights for transfers

You have the right to change your mind for transfers. We will send you a cancellation notice and you will have 30 days from receipt of this notification to cancel the proposed transfer(s) into your Dentons SIPP.

If you exercise your right to cancel the transfer into your Dentons SIPP, you should be aware that you might not get back the sum you originally invested. The amount you receive is the actual realisation value of the investment upon encashment less any applicable charges.

In addition, if you do decide to cancel the transferred funds, the original pension scheme is not obliged to accept the return of funds. In this instance it is your responsibility to provide us with details of a registered pension scheme that will accept the returned funds.

Transfer Declaration

Declaration

I confirm that I am requesting a transfer of funds to a Dentons SIPP from all of the plan numbers listed above.

I authorise and instruct the providers of the scheme(s) listed above (ceding provider(s)) to transfer funds from the plan(s) as listed above directly to Dentons Pension Management Limited (Dentons). Where the ceding provider(s) has asked me to give them any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the ceding scheme(s).

I authorise the ceding provider(s) to release all necessary information to Dentons to enable the transfer of funds to Dentons.

I authorise the ceding provider(s) to obtain from and release to my financial adviser (if applicable) any additional information that may be required to enable the transfer of funds. If an employer is paying contributions to any of the plans as listed above, I authorise the ceding provider to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s).

Until this transfer is accepted and complete, Dentons' responsibility is limited to the return of the total payment(s) to ceding provider(s).

Where the payment(s) made to Dentons represent(s) all of the funds under the plan(s) listed above, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from the plan(s) listed.

Where the payment(s) made to Dentons represent(s) part of the funds under the plan(s) listed above, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from that part of the plan(s) represented by the payment(s).

I promise to accept responsibility in respect of any claims, losses and expenses that Dentons and the ceding provider(s) may incur as a result of any incorrect information provided by me in this form or of any failure on my part to comply with any aspect of this form.

If I have taken benefits from any pension arrangement, with the ceding or any other pension provider, in a way which means I am subject to the Money Purchase Annual Allowance (MPAA), I have supplied the date the MPAA first applied to me above.
or

If I am transferring a capped drawdown arrangement(s) to a flexi-access drawdown arrangement(s), I will be subject to the MPAA from the date of my first flexi-access payment.

I confirm that I wish to invest my transfer funds as per my instructions. I understand that I cannot invest these funds in illiquid assets during the 30-day transfer cancellation period, therefore, in the absence of any other stated liquid investment option, I acknowledge that the funds will be held within the default bank account.

If I exercise my right to cancel the transfer(s) it may not be possible for the transfer to go back to the original transferring scheme. If this is the case, I agree that it is my responsibility to provide Dentons with details of a registered pension scheme that will accept the returned funds, within the 30-day period.

I also understand that if I exercise my right to cancel the transfer, I may not get back the sum that was originally invested and the amount I receive will be the actual realisation value of the investment upon encashment less any applicable charges.

I confirm that I understand my transfer cancellation rights.

Name

Member signature

Date (DD/MM/YYYY)

Please note:

You cannot invest transferred funds into illiquid assets, such as a property purchase, within the 30-day cancellation period. If there are no investment instructions provided other than for illiquid assets, then we will hold your transferred funds in the default cash account for the 30 days period, or until such time as alternative instructions are received.

Please note:

Money Purchase Annual Allowance (MPAA) will apply when pensions are flexibly accessed and will restrict annual contributions to £4,000.

Please note:

If you are in ill health at the time of making a pension transfer to your Dentons SIPP and should die within two years, the transfer could result in inheritance tax penalties. We recommend that you take independent financial advice.



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Dentons Pension Management Limited is authorised and regulated by the Financial Conduct Authority, register number 461094.

VAT number for Dentons Pension Management Limited is B63 1639 14