

# Aegon Self Invested Personal Pension (Aegon SIPP) transfer out

## About this form

Please complete this form to transfer to another registered pension scheme from your Aegon Self Invested Personal Pension (Aegon SIPP).

Please complete this form in BLOCK CAPITALS and ball point pen and return it to: Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB

Your pension is likely to be one of your most valuable assets. Like anything valuable, your pension can become the target for illegal activities, scams or offers of inappropriate and high risk investments. Find out more about the steps you can take to protect yourself from pension and investment scams and how to avoid them – visit <https://www.fca.org.uk/scamsmart> and the [pension-scams.com](http://pension-scams.com) websites.

## 1. Personal details

Customer name

Customer number (if known)

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Date of birth

D	D	M	M	Y	Y	Y	Y
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Product number (if known)

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National Insurance number

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## 2. Aegon SIPP scheme details

Scheme name	Scheme address	Product provider and scheme administrator	HMRC pension scheme tax reference (PSTR)	Trustees
Aegon Self Invested Personal Pension Scheme	Aegon Edinburgh Park Edinburgh EH12 9SE	Scottish Equitable plc	00773956RC	Aegon Pension Trustee Limited

### 3. Transfer details/full transfer/partial transfer

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Please contact your intermediary to obtain the latest valuation of your pension. This can be taken from the online valuation screen, or by phoning Aegon on 0345 604 4001 (calls may be recorded). Please note: this may be higher or lower than the final transfer value, as investment values are likely to change until the transfer is complete.

Please tell us the reason for your transfer:

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Please tell us the receiving scheme name

#### Transfer options

Full transfer

Partial transfer

If partial transfer is required, please complete section 4 partial transfer instruction or complete section 5 if a full transfer is to be made.

### 4. Partial transfer instruction

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On what basis would you like your partial transfer to be made:

Amount to transfer to new provider

Cash transfer

Re-register investments

- Partial transfers of funds in drawdown cannot be made. If a drawdown fund is to be transferred, it must be transferred in full.
- If 'Cash transfer' is selected, your intermediary will need to sell units to a sufficient value.
- If 'Re-register investments' is selected, the funds specified in 'Transfer of units' will be transferred without being sold.
- If any fund that forms part of a re-register of investments cannot be accepted by the receiving scheme we will contact you.

#### Transfer of units

If the value of the funds specified below is insufficient to meet the value specified in 'Amount to transfer to provider' at the point of transfer, we will contact you. If there is insufficient space to list funds, please continue on a separate sheet.

Fund manager, fund name and share class

## 5. Full transfer instruction

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How would you like your full transfer to be made?

Cash transfer

Re-register investments

- If 'Cash transfer' is selected, your intermediary will need to sell units to a sufficient value.
- If 'Re-register investments' is selected, the funds specified in 'Transfer of units' will be transferred without being sold.
- If any fund that forms part of a re-register of investments cannot be accepted by the receiving scheme we will contact you.

### Transfer of units

If there is insufficient space to list funds, please continue on a separate sheet.

Fund manager, fund name and share class

## 6. Declaration

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**Declaration to be signed by the client. I, you and your refers to you, the applicant named in section 1, and Aegon, or we refers to AEGON Pension Trustee Limited as trustees of the AEGON Self Invested Personal Pension Scheme.**

- I formally request a transfer to be made from the above pension numbered in section 1 to the receiving scheme set out in section 3.
  - I understand that all of the assets that make up my chosen transfer value will be sold and transferred as cash, except for those funds that cannot be sold or those that I have specifically nominated for a re-register of investments.
  - Where I have elected for re-registration of investments, I understand the investment fund(s) listed in the table at section 4 or 5 will be re-registered from my Aegon SIPP to the receiving scheme named in section 3.
  - I understand that any sales that Aegon must complete in order to provide sufficient cash to meet my chosen transfer value must be requested by my intermediary.
  - I understand that transferring my funds as part of a re-register of investments may incur CREST transfer or other re-registration fees for each holding, which are payable from my pension.
  - I understand that the ability to sell some assets may be limited and as a result the transfer may be delayed.
  - I agree the transfer shall be sufficient to end any of my claims to pension benefits from the portion of the plan that is transferred and Aegon will have no further liability or obligation in respect of the transfer.
  - I understand that where I want to transfer out part of my Aegon SIPP product wrapper, the value of what remains, after the transfer must not be less than £1,000. Where the value of my product wrapper remaining would be less than £1,000 Aegon reserve the right to transfer the whole value and close your product wrapper.
- I understand that my transfer will only be completed if my chosen receiving scheme is able and willing to accept the transfer and properly completed this form.
  - I declare that to the best of my knowledge and this belief the statements made on this form and its attachments (whether in my handwriting or not) are correct and complete.
  - I agree to take responsibility for any losses or expenses that result from any untrue, misleading or inaccurate information that is given by me or on my behalf, on this form, or in respect of the transfer.

Date

D	D	M	M	2	0	Y	Y
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Signature

X									X
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## 7. Receiving registered pension scheme details

(To be completed by the receiving scheme provider)

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The following information is required before the transfer can be initiated

### Registered pension scheme details

Receiving scheme name

Plan/policy number

### Receiving scheme type

What is the receiving scheme type?

- a) Personal or stakeholder pension
- b) Insured occupational scheme
- c) Non-insured occupational and other schemes

Name of insurer/life office/  
personal pension operator

FCA number

Address of the trustees/administrator

Postcode

### Contact details

Contact name

Telephone number

Receiving scheme address (to which  
correspondence should be sent to)

Postcode

- We have enclosed a copy of the HMRC registration certificate that has been clearly printed from the Pension Schemes Online website within the last 30 days.

## 8. Payment details

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Payee

Account number

Bank name

Branch sort code

## 9. Re-register of investments requirements

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To be completed if re-register of investments is required, please provide details of the receiving investment manager.

Investment manager/broker name

Telephone number

Investment manager/broker address  
(to which correspondence should be sent to)

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Reference number

Postcode

## 10. Declaration for scheme trustees

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I/We declare that the receiving scheme is able and willing to accept the transfer payment in cash and/or by re-registration of investments, as set out in this form, and that it will be used to provide appropriate retirement benefits within the receiving scheme named in section 7. I/We confirm that the information given is accurate to the best of my/our knowledge and belief.

I/We declare that the receiving scheme named in section 7 is and will continue to be a registered pension scheme. If it isn't a registered pension scheme at the time of transfer, we will return the transfer.

Signature

Signed for on behalf of the receiving scheme

Print name

Date

D	D	M	M	2	0	Y	Y
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Position



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