

Transfer out form

Complete this form if you would like to transfer your pension savings to another UK registered pension scheme.

Before you complete this transfer out form, it is important that you read the information below.

- **Smart Pension guidance** - you can find this on www.smartpension.co.uk by selecting **Members**, then **stay-on-track** and **move your pension savings** and **How to move money away from Smart Pension**
- **Risk warnings** - you can find out more about the risks related to transferring your pension savings by reading the accompanying PDF and by visiting <https://support.autoenrolment.co.uk/en/articles/2933444-moving-your-pension-from-smart-to-another-provider>
- **Scam awareness** - pension scams are on the rise and you need to be particularly careful when you are considering transferring your pension savings somewhere else. You can find more information about being Scam Smart at www.fca.org.uk/scamsmart.
- **Financial advice** - we strongly recommend talking to a financial adviser about your decision to transfer your pension savings. You can find a local financial adviser by visiting <https://moneyandpensionservice.org.uk/>

Section A - provide us with your details

This is a mandatory section. Please provide your details below in **block capitals**.

First name	
Surname	
Former surname, if any	
Date of birth	
National Insurance number	
Your Smart Pension account number	
Your contact telephone number	

Your personal email address

Section B - your confirmation to proceed

This is a mandatory section.

You will need to tick 'yes' or 'no' in the table below to each of the below statements.

<p>I confirm that I wish to transfer the value of my pension savings in the Smart Pension Master Trust to the UK registered receiving pension scheme identified in section D of this form.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>I confirm I have read the information and guidance on transfers available to me from Smart Pension.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>I confirm that I have read the risk warnings PDF accompanied with this form and the information on https://support.autoenrolment.co.uk/en/articles/2933444-moving-your-pension-from-smart-to-another-provider regarding transfers from my Smart Pension account.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>I confirm that I have read the information that is available from the Pensions Regulator and the Financial Conduct Authority about pension scams and how to spot and avoid them.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>I confirm that I obtained impartial information and guidance from the Pensions Advisory Service about the potential transfer of my pension savings to the receiving UK registered pension scheme identified in section D of this form.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p><i>**This is not a mandatory requirement**</i></p>		
<p>I confirm the pension savings in my Smart Pension account are not subject to a sharing or attachment order, as part of any divorce settlement.</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>

I confirm that I have obtained regulated advice on the transfer of my pension savings in the Smart Pension Master Trust to the receiving scheme identified in section D of this form.

Yes

No

If yes, please also provide the following details/item:

Adviser name:

Name of adviser firm:

Telephone number:

Email address:

FCA number:

Section C - your declaration

This is a mandatory section.

- I understand that the transfer value figure quoted by Smart Pension is not guaranteed and may change by the time of actual payment.
- I authorise Smart Pension to provide whatever information and documentation may be required by the administrator of the receiving scheme identified in section D of this form to facilitate the transfer of my pension savings.
- I acknowledge and accept that upon the payment of the transfer value by Smart Pension to the receiving scheme identified in section D of this form, all rights and benefits I or my successors in title may have under the rules of the Smart Pension Master Trust will cease.
- I acknowledge that once the transfer to the receiving scheme identified in section D of this form has been completed, the Trustee of the Smart Pension Master Trust will be under no obligation to reverse the transaction or otherwise accept me back as a member of the latter scheme.

By signing below I agree to be bound by the above declaration and all the confirmations I have provided. **We do not accept electronic signatures.**

Member signature: _____ Date: _____

Section D - Your new UK registered pension scheme (to be completed by your new scheme administrator)

This section **should only** be completed by the UK registered pension scheme you have chosen to transfer your Smart Pension account to.

You will need to send this form to your new pension scheme and ask them to return the form directly to Smart Pension using the details in section E .

Note to administrator: once you have completed section D of this form, please return the form directly to Smart Pension Master Trust using the details in section E .

Scheme details

Formal name of receiving scheme	
Full name and address of the administrator of the receiving scheme	
Pension scheme tax reference number (PSTR) allocated by the HMRC tax authorities	
Scheme type	

Bank details

Name of bank	
Bank account name	
Account number	
Sort code	
BACS payment reference	

Please remember to include a copy of HMRC Certificate so that we can proceed with the transfer.

Administrator confirmations

You must tick either 'yes' or 'no' in the table below for each of the following statements.

We will not be able to proceed unless this has been completed.

<p>The receiving scheme is a registered pension scheme under the Finance Act 2004 with the PSTR number as shown above and is willing and able to accept the above member's cash equivalent transfer Value. We authorise HMRC to release to the transferring scheme such information as required to confirm this registered status</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>The above member is, or will be on receipt of payment from the transferring scheme, a member of the receiving scheme</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>The cash equivalent transfer accepted by the receiving scheme will be applied to provide benefits for and in respect of the member in accordance with the applicable relevant legislation and the rules of the receiving scheme</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>Where a pension sharing order or attachment order exist at the date of transfer and details have been provided by the transferring scheme, the receiving scheme trustees undertake to take any such Order into account in respect of the member's benefits in the receiving scheme</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
<p>The receiving scheme trustees acknowledge that upon completion of the transfer, all rights the member had under the transferring scheme will cease and the receiving scheme will meet all future rights of the member</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>

We note that in consideration of the above confirmations, the trustees of the transferring scheme will, upon receipt of this completed form from the member and the receiving scheme, forward the cash equivalent transfer value to the above bank account for the receiving scheme.

Contact details for administrator representative

Full name of contact at the administrator to the scheme	
Position of the contact at the administrator	
Full postal address for the contact at the administrator (if different to the address given on the previous page)	
Telephone number	
Email address	
Signature of contact at the administrator	
Date of signature	

Section E - Returning the form to us

Complete and return this form to us.

Our preferred method would be by email

If you are able to, please scan and email your completed application form:

transfers@smartpension.co.uk

Alternatively, you can post your application form to:

Smart Pension, Oxford Point, 19 Oxford Road, Bournemouth, BH8 8GS

If you have any questions about this form, please email transfers@smartpension.co.uk or call us on 0333 666 2626.

Data protection

We will hold and use your personal data so that we can administer the scheme and provide you and your dependants with the correct benefits. We will do so in accordance with GDPR legislation. For more information about how we use your personal data, see our privacy policy at <https://www.smart.co/footer/privacy-policy>.