

# I.P.M. Personal Pension Scheme

## Transfer In Questionnaire



### TO BE COMPLETED BY THE ADMINISTRATOR OF THE TRANSFERRING SCHEME

1.

Full title of transferring scheme:	
Is the scheme a Registered Pension Scheme under Finance Act 2004? <input type="checkbox"/> Yes <input type="checkbox"/> No	
HMRC Registration Number:	Policy Number:
Name and address of administrator of transferring scheme:	
<b>Amount of transfer payment:</b>	£ _____
• Value of the contracted-out benefits	£ _____
• Cash value of Protected Rights in respect of employment before 6 April 1997	£ _____
• Cash value of Protected Rights in respect of employment before 5 April 1997	£ _____
• Cash value of Guaranteed Minimum Pension	£ _____
• Cash value of Section 9 (2B) Rights	£ _____
• Start date for the payment of Minimum Contributions	06 / 04 / _____
• Cancellation date	____ / ____ / ____
Is the transfer in specie?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide schedule of assets and values.	
Have any benefits been paid from the fund being transferred?	<input type="checkbox"/> Yes <input type="checkbox"/> No
(If yes, please complete (2 and 3) below)	

2.

• Transfer value in respect of Uncrystallised Pension Fund	£ _____
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3.(a)

Transfer value Unsecured Pension Fund in respect of Pre 6th April 2006 benefits	£ _____
• Has the benefit been recalculated Post 6th April 2006	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total percentage of Lifetime Allowance (LTA) utilised	£ _____

(b)

Unsecured Pension Fund in respect of Post 6th April 2006	£ _____
• Date benefit first drawn	____ / ____ / ____
- Total Percentage of Lifetime Allowance (LTA) Utilised	_____ %
- % Of which: LTA taken as lumpsum	_____ %
- LTA used to provide USP	_____ %
• Maximum Pension Payable	£ _____
• In respect of the current payment period total Pension paid to date of transfer	£ _____

**4.** Is the member entitled to receive benefits before the standard Minimum Pension Age  
(i.e. before age 55 or before age 50 until 6 April 2010)  Yes  No  
If yes at what age can benefits commence? \_\_\_\_\_

**5.** Is any element of the transfer in respect of a Pension Sharing Order  Yes  No  
If yes, how much? £ \_\_\_\_\_  
And is there a restriction of the amount of lump sum payable  Yes  No  
If yes, amount: £ \_\_\_\_\_

**6.** Is there an element of the transfer which relates to safeguarded rights?  Yes  No  
If yes, how much £ \_\_\_\_\_

**7.** Is the transfer subject to an Earmarking Order?  Yes  No  
If yes, please provide a copy of order.

**8.** Is the transfer part of a block transfer? (Paragraph 22, schedule 36, Finance Act 2004)  Yes  No  
If yes:-

- name(s) of other transferring members: \_\_\_\_\_
- If yes what was the Pension Commencement Lump Sum as @ 5th April 2006: £ \_\_\_\_\_ £ \_\_\_\_\_
- The value of the relevant scheme @ 5th April 2006: £ \_\_\_\_\_ £ \_\_\_\_\_
- The current value of the relevant scheme contained within the total proposed transfer value: £ \_\_\_\_\_

We declare that the transfer is in respect of the whole of the member's entitlement to benefits under the ceding scheme.

We declare that to the best of our knowledge the information given above is accurate and complete.

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

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