SIPP
Transfer In Questionnaire

IPM PERSONAL PENSION SCHEME

TO BE COMPLETED BY THE ADMINISTRATOR OF THE TRANSFERRING SCHEME

1

Client name:

Full title of transferring scheme:

Is the scheme a Registered Pension Scheme under Finance Act 2004? ◯ **Yes** ◯ **No**

HMRC Registration Number: **Policy Number:**

Name and address of administrator of transferring scheme:

Postcode

Amount of transfer payment:	**£**
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?	◯ **Yes** ◯ **No**
If yes, please provide schedule of assets and values.	**£**
Have any benefits been paid from the fund being transferred?	◯ **Yes** ◯ **No**

(If yes, please complete section 2 below).

2

Transfer value in respect of Uncrystallised Pension Fund	£
Transfer value drawdown in respect of Pre 6th April 2006 benefits	£
Total percentage of Lifetime Allowance (LTA) utilised	%
Drawdown in respect of Post 6th April 2006	£
Date benefit first drawn	/ /
Total Percentage of Lifetime Allowance (LTA) Utilised	%
Amount crystallised to provide pension	£
Amount crystallised to provide pension PCLS	£
Maximum Pension Payable	£
In respect of the current payment period total Pension paid to date of transfer	£

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?	

3

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

4

Is there an element of the transfer which relates to safeguarded rights? ◯ Yes ◯ No

If yes, how much? £

5

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:

The value of the relevant scheme at 5th April 2006:

The current value of the relevant scheme contained within the total proposed transfer value: £

6

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**

I.P.M. SIPP Administration Limited is Authorised and Regulated by the Financial Services Authority.

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