

# Application to join The People's Pension and authorisation to transfer benefits held in B&CE arrangements



## Part A: Your details

Forename(s)

Surname

National Insurance number

Address

  

Postcode

Date of birth

  

Email

Phone number

## Part B: Benefits you'd like transferred to The People's Pension Scheme

Please tick the relevant benefits/pension savings you have with B&CE you'd like to transfer:

☐ Lump Sum Retirement Benefit (LSRB)\*

☐ Voluntary contributions (AVCs/EAVCs)\*\*

\*Please tick to confirm that you understand that you'll lose the right to take the whole of your LSRB as a tax-free cash sum once it's transferred.

\*\*Please note that your additional voluntary contributions (AVCs) and employer additional voluntary contributions (EAVCs) must be transferred at the same time as one another.

If you're in any doubt whether transferring is right for you, please contact an independent financial adviser (IFA). If you don't have an IFA, you may be able to find one at [www.unbiased.co.uk](http://www.unbiased.co.uk)

## Part C: Your options under The People's Pension

### 1. Choose your selected retirement age

This will be the age we understand you wish to access your pension savings. You can access your pension savings from your normal minimum pension age - find out more at [www.thepeoplespension.co.uk/minimum-pension-age-change/](http://www.thepeoplespension.co.uk/minimum-pension-age-change/)

Please enter your selected retirement age

If you don't choose a selected retirement age, we'll link it to your current State Pension age. Please read the enclosed member booklet for more information.

## 2. Your investment options

The People's Pension offers 3 investment profiles and 8 investment funds. Please ensure you read the enclosed member booklet for more information. To find out more about your investment options, please visit [www.thepeoplespension.co.uk/investments/](http://www.thepeoplespension.co.uk/investments/)

If you want to select an investment profile please tick the appropriate box below:

'Adventurous' investment profile

'Balanced' investment profile

'Cautious' investment profile

Alternatively you can choose to self-select investment funds by stating the % of your transferred funds and any contributions you'd like to be invested in any combination of the funds below. Please make sure the % for funds chosen adds up to 100%.

B&CE Global Investments (up to 100% shares) fund	<input type="text"/> %	B&CE Ethical fund	<input type="text"/> %
B&CE Global Investments (up to 85% shares) fund	<input type="text"/> %	B&CE Shariah fund	<input type="text"/> %
B&CE Global Investments (up to 60% shares) fund	<input type="text"/> %	B&CE Cash fund	<input type="text"/> %
B&CE Pre Retirement fund	<input type="text"/> %	B&CE Annuity fund	<input type="text"/> %

If you don't select a profile and don't choose to self-select, we'll invest your transferred funds and any contributions you make into the 'balanced' investment profile, which is the default investment profile.

## Part D: Your application to join The People's Pension Scheme

By completing this form, you're confirming that you wish to transfer benefits to and join The People's Pension.

If you also wish to pay regular contributions by Direct Debit to The People's Pension, simply call us on 0300 2000 555 to ask for our:

1. **'Making personal contributions to your pension'** form.
2. **Direct Debit mandate** form.

**We need the personal contributions form and the Direct Debit mandate form completed and returned before we're able to carry out our checks. Until we've completed our checks, we won't be able to begin taking payments from you.**

You can print, scan and send these to us at [personalpayments@peoplespartnership.co.uk](mailto:personalpayments@peoplespartnership.co.uk), though please note this isn't considered a secure way of sending us your information. You can also print and send these to us by post at **Freepost THE PEOPLES PENSION**. It'll take around 10 working days to arrange your Direct Debit with your bank – we'll write to you once it's set up.

## Part E: Your declaration

I apply to become a member of The People's Pension and agree to be bound by the Rules of the Scheme.

I have been provided with **The People's Pension member booklet** and I am satisfied The People's Pension is suitable for my requirements.

I have considered my options fully, believe transferring to The People's Pension is appropriate for my needs, and authorise and instruct you to transfer the benefits indicated into The People's Pension.

I have not asked for advice and I have not received advice from any representative of The People's Pension Trustee Limited or its agents, including People's Partnership.

I understand that the information and personal data I have provided on this form and any other personal data about me that is held by People's Partnership in connection with my pension savings, may be disclosed in accordance with People's Partnership's data protection policies at [www.peoplespartnership.co.uk/privacy-policy](http://www.peoplespartnership.co.uk/privacy-policy).

Signature

Date

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The People's Pension Scheme is an occupational pension scheme, governed by The People's Pension Trustee Limited and administered by People's Administration Services Limited. The Scheme is approved by HM Revenue and Customs (HMRC) as a Registered Pension Scheme under Chapter 2 Part 4 of the Finance Act 2004 (PSTR number 00785199RQ).

**Please return to: [admintransfers@peoplespartnership.co.uk](mailto:admintransfers@peoplespartnership.co.uk) or Freepost THE PEOPLES PENSION**

**Also, please keep a copy of this completed form for your own records. We'll confirm to you we've received it.**