

Authorisation and request to transfer benefits held in other B&CE arrangements to The People's Pension Scheme



Please complete all boxes using block capitals.

Part A: Your details

Forename(s)	Customer number
<input type="text"/>	<input type="text"/>
Surname	National Insurance number
<input type="text"/>	<input type="text"/>
Address	
<input type="text"/>	
<input type="text"/>	
Postcode	Date of birth
<input type="text"/>	<input type="text"/>
Email	Phone number
<input type="text"/>	<input type="text"/>

B. Benefits you'd like transferred to The People's Pension scheme

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

Lump Sum Retirement Benefit (LSRB)*

*Your LSRB is payable as a 100% tax-free lump sum. Please tick the box to confirm that you understand that you'll lose the right to take 100% of your LSRB as a tax-free cash sum once it's transferred.

Value

£

Voluntary contributions (AVCs/EAVCs)**

*You may have an entitlement to more than 25% tax-free cash for your pre-87 AVCs/EAVCs. Please tick the box to confirm that you understand that you will lose these rights if you transfer and any tax-free cash paid will be limited to 25% of your fund.

Post-1987 value

£

Pre-1987 value

£

Total

£

**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

C. Your declaration

I've considered my options fully and confirm that I wish to transfer policies as shown above into my account with The People's Pension scheme. I've read and understood the explanatory notes 'Important information about transferring your 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 B&CE or representatives of People's Partnership.

Important: In the event of the transfer proceeding, unless we're informed otherwise, the investment profile/funds for your pot with The People's Pension will remain unchanged and the transferred value will be invested on the same basis.

If you transfer another pension scheme into The People's Pension, you might not be able to take a pension pot of £10,000 or less all in one go within the next 5 years. Contact us for more information on these rules.

I give my consent to The People's Pension Trustee Limited and the administrators of The People's Pension scheme to seek information from the administrator/trustee(s) of the transferring scheme(s) and for them to provide The People's Pension with such information before the transfer can proceed.

Please sign and date below:

Signature

Date