

Retiready Pension transfer authority form

This form should be used to transfer the full value of an existing pension to a Retiready Pension. If you need any help completing it then please visit the support homepage.

Please ensure that this form is fully completed, signed and return it to clientsupport@arc.aegon.co.uk to enable us to proceed with your application. Please note the transferring scheme may also require you to sign a separate discharge form.

Aegon can't give financial advice and haven't provided any personal recommendations for the transfer being requested.

If your personal circumstances mean you need additional support, or if you'd like a large print, Braille or audio CD version of this document, please contact us on 03456 100 072 (call charges will vary) or visit aegon.co.uk/support Our email system and the way we deal with data is internally secure. However, we were unable to ensure the security of emails before they reach us. Please consider this when sending us sensitive information.

For your convenience you can complete this form electronically by simply typing your replies in the appropriate sections below.

1. Personal details

Title

Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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Permanent home address

Postcode

Please enter the Retiready plan number that you are transferring to. You'll find this on your savings homepage.

2. Details of pension to be transferred

Full name of pension scheme (the 'transferring scheme'). You'll find this in your existing terms and conditions or by contacting your current pension provider.

Full name of scheme administrator/current provider/insurer

Scheme address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Postcode

Transferring scheme plan number

Approximate transfer value to be paid to Retiready. Please note that we don't accept partial pension transfers. You must transfer the full value of your existing pension.

£

3. Declaration

I consent to the transfer payment from the transferring scheme being paid to the Aegon Self Invested Personal Pension Scheme (the 'Scheme'), under which the Retiready Pension is provided, to provide benefits for me.

I authorise and instruct the scheme administrator of the transferring scheme to transfer funds from the plan numbered in section 2 directly to the Scheme.

I authorise the scheme administrator of the transferring scheme to release all necessary information to Retiready to enable the transfer of funds to Retiready.

I declare that where the source of the transfer is a retirement annuity contract, that contract is not written under trust.

Date

D	D	M	M	2	0	Y	Y
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Signature (please sign using a ballpoint pen)

X	X
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