Fidelity INTERNATIONAL

Personal Investing

The Fidelity SIPP

Transfer Application form to move other pensions to your Fidelity SIPP. This form is quick and easy to fill in, it should only take a short time to complete. Or go to **fidelity.co.uk** to apply.

Use this form to:

- transfer up to three other pensions to your Fidelity SIPP
- keep the same fund choice as your current pension or transfer the pension value as cash and make your fund selection

Don't use this form if:

- you haven't yet opened your Fidelity SIPP
- you want to make any other changes to your Fidelity SIPP.

Before you fill in this form:

- make sure you read the important documents shown in the box to the right.

How to fill in this form

- please use black ink and write clearly inside the boxes provided using capital letters
- mark your answers with a cross in the appropriate box like this: ☒
- if you make a mistake, please correct it but don't use correction fluid.

Checklist

- ☐ read our Transfer fact sheet
- ☐ check you have answered all the questions correctly
- ☐ Read and sign the Declaration in section 3.

What's next?

send your completed form to:

Fidelity Personal Investing
PO Box 80
Tonbridge
TN11 9FF

Further information on fidelity.co.uk

You should read these documents before completing this form. You will find them at **fidelity.co.uk/sippinfo**

- Terms and Conditions – this document governs our relationship with you and forms the agreement between us in relation to the Fidelity SIPP.
- Key Features Document – this summarises everything you need to know about the Fidelity SIPP
- When choosing your funds make sure you read the key Information document which sets out key information about the fund including the objectives and risks, what it invests in and its charges.
- Our Transfer fact sheet

Want to talk to us?

Freephone **0800 358 7480**

Mon–Sat 9am–6pm

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Issued by Financial Administration Services Limited, (a Fidelity Personal Investing company), which is authorised and regulated by the Financial Conduct Authority.

1 About you

1.1 Your details

1.1.1 Title

☐ Mr ☐ Mrs ☐ Ms ☐ Other:

1.1.2 Surname

1.1.3 First and other names in full

1.1.4 Gender

☐ Male ☐ Female

1.1.5 Date of Birth

1.1.6 Employment status

☐ Employed ☐ Self-employed ☐ Unemployed ☐ Full-time education

☐ Pensioner ☐ Caring for children under 16 ☐ Other - please specify below.

1.1.7 Do you have a National Insurance (NI) number? You can find this on a payslip or a letter from HMRC or DWP.

☐ No ☐ Yes -

1.1.8 Are you a UK National only? (Please mark an X in the box) ☐

1.1.9 Are you a UK National and National of one or more other countries?
(Please mark an X in the box and list all other countries below) ☐

1.1.10 Are you a National of Non-UK countries only?
(Please mark an X in the box and list all other countries below) ☐

Nationality 1

Nationality 2

Nationality 3

Nationality 4

1.1.11 Phone numbers

Home

Mobile

1.1.12 Email

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1 About you (continued)

1.1.13 Your address. 'Care of' and PO Box are not acceptable.

House number/name

Street, city, county and country

Postcode

1.1.14 What is your client reference number?

1 0

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2 Transfers

2.1 Your transfers

2.1.1 Confirmation

☐ I confirm I have read and considered the warnings on pension transfers and opt outs in the Transfer fact sheet and I wish to continue with my pension transfer.

2.2 Transfer scheme 1

2.2.1 Policy reference number. This is available from your previous employer or pension manager and is normally shown on your annual statement of benefits.

2.2.2 Which type of pension scheme do you wish to transfer?
We cannot accept transfers from defined benefit pension schemes.

☐ Occupational arrangement or Company Pension ☐ Personal Pension arrangement ☐ Do not know

2.2.3 What is the estimated transfer value?

£

2.2.4 Do you want to keep the same fund choice as your current pension?
If we hold the same funds in our fund supermarket we will transfer your pension into the same funds (using a process called re-registration). Where this is not possible, or you select No, your funds will be sold and the cash balance transferred into cash within your account. You will be able to invest any money transferred as cash once your transfer has completed.

☐ No ☐ Yes

If you choose to keep the same fund choices and any of your existing funds pay income, we will follow your existing preferences for income payments on your account.

2.2.5 The scheme name from which you wish to transfer

2.2.6 Name of pension administrator

2.2.7 Address of pension administrator
Building number/name

Street, city, county and country

Postcode

2.2.8 Telephone number

Please refer to Section 4: Appendix - Transfer scheme 2/3 (Page 5-6) if you wish to make additional scheme transfers

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3 Your application summary

3.1 Declaration and signature for transfers

I confirm that where I do not understand any or all of the information relating to my transfer application for the Fidelity SIPP, I will seek suitable advice before proceeding.

Declarations

In relation to my transfer application for the Fidelity SIPP, I make the declarations set out below.

I declare that:

- I have been provided with and read the Fidelity SIPP Terms & Conditions, Key Features Document, key information documents relevant to the chosen fund(s) to read and I understand that this transfer will be bound by the Rules (as this term is defined in the Fidelity SIPP Terms & Conditions).
- I authorise you to release all necessary information to Fidelity to enable the transfer of funds to the Fidelity SIPP.
- I authorise and instruct you to transfer funds from the plans listed in this application directly to Fidelity. Where you have asked me to give you any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer(s) listed in this application.
- Where I have requested a transfer re-registration, I authorise and instruct you to re-register the assets from the plan(s) to Financial Administration Services Limited. I authorise you to sell and transfer in cash any assets which cannot be re-registered or held by Fidelity.
- If an employer is paying contributions to any of the plans as listed in this application, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s). Until this application is accepted and complete, Fidelity's responsibility is limited to the return of the total payment(s) to the current provider(s).
- Where the payment(s) made to Fidelity represent(s) all of the funds under the plan(s) listed in this application, then payment made as requested will discharge the current provider(s) of all claims and responsibilities in respect of the plan(s) listed.
- Where the payment(s) made to Fidelity represent(s) part of the funds under the plan(s) listed in this application, then the current provider(s) will be discharged of all claims and responsibilities only in respect of the part of the plan(s) represented by the payment(s).
- I promise to accept responsibility in respect of any claims, losses and expenses that Fidelity and the current provider(s) may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.
- I confirm that, where I am transferring Protected Rights, I wish to transfer these from the current provider(s) to Fidelity.
- I confirm that I have not received advice from Fidelity in connection with this transfer.

Your signature

By signing here you confirm that you've read and completed all relevant sections as per the instructions on this form.

Signature

Date signed

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4 Appendix: Transfer schemes 2/3

4.1 Transfer scheme 2

4.1.1 Policy reference number. This is available from your previous employer or pension manager and is normally shown on your annual statement of benefits.

4.1.2 Which type of pension scheme do you wish to transfer?
We cannot accept transfers from defined benefit pension schemes.

☐ Occupational arrangement or Company Pension ☐ Personal Pension arrangement ☐ Do not know

4.1.3 What is the estimated transfer value?

£

4.1.4 Do you want to keep the same fund choice as your current pension?
If we hold the same funds in our fund supermarket we will transfer your pension into the same funds (using a process called re-registration). Where this is not possible, or you select No, your funds will be sold and the cash balance transferred into cash within your account. You will be able to invest any money transferred as cash once your transfer has completed.

☐ No ☐ Yes

4.1.5 The scheme name from which you wish to transfer

4.1.6 Name of pension administrator

4.1.7 Address of pension administrator

Building number/name

Street, city, county and country

Postcode

4.1.8 Telephone number

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4 Appendix: Transfer schemes 3/3 (continued)

4.2 Transfer scheme 3

4.2.1 Policy reference number. This is available from your previous employer or pension manager and is normally shown on your annual statement of benefits.

4.2.2 Which type of pension scheme do you wish to transfer?
We cannot accept transfers from defined benefit pension schemes.

☐ Occupational arrangement or Company Pension ☐ Personal Pension arrangement ☐ Do not know

4.2.3 What is the estimated transfer value?

£

4.2.4 Do you want to keep the same fund choice as your current pension?
If we hold the same funds in our fund supermarket we will transfer your pension into the same funds (using a process called re-registration). Where this is not possible, or you select No, your funds will be sold and the cash balance transferred into cash within your account. You will be able to invest any money transferred as cash once your transfer has completed.

☐ No ☐ Yes

4.2.5 The scheme name from which you wish to transfer

4.2.6 Name of pension administrator

4.2.7 Address of pension administrator

Building number/name

Street, city, county and country

Postcode

4.2.8 Telephone number

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