

# 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
- you are looking to access your pension for tax free cash or drawdown – please refer to [www.fidelity.co.uk/retirement/](http://www.fidelity.co.uk/retirement/)
- you have already taken tax free cash from any of the pensions that you are transferring.

## Before you fill in this form:

- if you are transferring a pension(s) with defined benefits or guarantees, we may require you to take advice – please refer to [www.fidelity.co.uk/transfer/pension/](http://www.fidelity.co.uk/transfer/pension/)
- 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 pension 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 9YA**



## Further information on [fidelity.co.uk](http://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 investments make sure you read the key Information document which sets out key information about the investments including the objectives and risks, what it invests in and its charges.
- Our pension transfer fact sheet.

## Want to talk to us?

Freephone **0800 358 7480**



# 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 Date of birth (DDMMYYYY)

### Town of birth

### 1.1.5 Country 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 Driving Licence number (if applicable - 18 characters as shown on your photocard)

### 1.1.12 Phone numbers

Home

Mobile

### 1.1.13 Email





### 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 read the literature relating to the Fidelity SIPP 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 investments 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 investments 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 investments 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 investments 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 investments 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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