



Transfer in form To the Trustee

1. Your details

Surname	Employer
First name	Personal email*
National Insurance Number □ □ □ □ □ □ □ □ □ □	Mobile number*
Date of Birth □ □ □ □ □ □ □ □	*We will use these details to contact you with information about your retirement savings.
Address	

2. To the Trustee

I authorise XPS Group to obtain the information needed to help transfer my retirement savings from the pension arrangement shown below, into the Trust.

Previous Pension Provider
Administrator
Name of Pension Scheme
Policy Number
Estimated Transfer Value £
Address of Pension Provider

If you would like to transfer in your savings from more than one pension provider, please complete an additional form.



3. Benefits

	Tick one option	
	YES	NO
1. Do you have any Lifetime Allowance Protection? If yes, please provide a copy of the certificate issued by HMRC.	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you taken out any taxable payments from any of your pensions, are your yearly savings restricted to £10,000 (the Money Purchase Annual Allowance)?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have an attachment order applying to the benefits accrued within your previous scheme?	<input type="checkbox"/>	<input type="checkbox"/>
4a. Is the transfer from a Defined Benefit scheme?	<input type="checkbox"/>	<input type="checkbox"/>
4b. If yes, have you have received advice from a FCA authorised financial adviser regarding the transfer (where the value is more than £30,000)?	<input type="checkbox"/>	<input type="checkbox"/>

4. Investing your transferred savings

We automatically invest the money transferred from your previous pension in line with your current investment choices. You can update these choices any time online by logging into your personal account at www.seimastertrust.co.uk

For further information about your investment choices please visit www.seimastertrust.co.uk/saving-and-investing

5. Declaration

- I confirm the personal details given above are correct to the best of my knowledge.
- I agree to comply with and be bound by the Trust Deed and Rules.
- I authorise the current provider to release all necessary information to XPS Group to enable the transfer of funds to the SEI Master Trust.
- I authorise and instruct the current provider to transfer my funds from the above listed scheme to the SEI Master Trust.
- I understand my savings will be transferred and invested, unless I've chosen to leave the money in cash for up to 30 days. I also understand charges apply to any savings invested, as shown in my personal documents online.
- Where the payment made to XPS Group represents all of the funds under the Scheme, this will remove the current provider of all claims and responsibilities for me.
- I confirm it is my responsibility to understand if there are guarantees or bonuses relating to the pension I am transferring, and the associated impact of transferring a pension with guarantees.
- I understand that the pension provider I am transferring from may apply charges to transfer out and it is my responsibility to check.
- Where the payment made to XPS Administration represents all of the funds under the Scheme, this will remove the current provider of all claims and responsibilities for me.
- I understand that consolidating my pensions does not guarantee a better retirement and that all investments can go down as well as up.

Please sign the form on the following page.



6. Sign to confirm

Signature

Date:

D	D	M	M	Y	Y	Y	Y
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Please return the completed form to:

Trust Administration
XPS Group
PO Box 562
Middlesbrough
TS1 9JA

Or email:

memberenquiries@seimastertrust.co.uk