# 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/
- 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/
- Note: If you want to move your current assets to the exact same assets
  with Fidelity this is called an 'in-specie' transfer; simply put you want to
  transfer the ownership of that asset from one pension provider to another,
  without the need to sell to cash first. To avoid delay, please check with
  your current provider that they can facilitate an 'in-specie' transfer.
- 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
- ullet mark your answers with a cross in the appropriate box like this: old X
- 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 PO Box 391 Tadworth KT20 9FU



# 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 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** 

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About you

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

# 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**



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# 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. Which type of pension scheme do you wish to transfer? For a transfer from a defined benefit pension scheme, please refer to www.fidelity.co.uk/transfer/pension/ Occupational arrangement or Company Pension Personal Pension arrangement Do not know Have you ever taken any benefits (e.g., tax free cash) from this pension? If yes, please refer to www.fidelity.co.uk/retirement/ If no, please proceed to 4.1.4. Do you intend to take any benefits from this pension after your transfer is complete? This includes taking a taxfree lump sum, regular income, ad-hoc income or lump sums, or purchasing an annuity. If yes, please refer to www.fidelity.co.uk/retirement/ If no, please proceed to 4.1.5. 4.1.5 Is this a full or partial transfer? (If this is a partial transfer then please include the exact amount to be transferred in 4.1.6) Partial transfers are only available if you're transferring as cash. Full **Partial** What is the estimated transfer value? Do you want to keep the investment choice as your current pension? Depending on what investments you hold with your current provider(s) will affect how they are sent to us. We will keep you invested in the same investment (or a similar version) where possible, and where appropriate, we will convert your investments into a cheaper version of the same fund. Where an investment transfer is not possible, or you select No, your investments 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 The scheme name from which you wish to transfer Name of pension administrator 4.1.10 Address of pension administrator Building number/name Street, city, county and country Postcode

FILSIPPTransferIntP

4.1.11 Telephone number