

LF Stakeholder Pension Scheme

# Transfer in application form

**Important Information**

This form can be used for transfer payments into an existing LF Stakeholder Pension Plan.

Before completing this application, please read the **Key Features** and **Terms and Conditions** of the LF Stakeholder Pension Scheme.

Only complete this application if you are:

- Intending to transfer in pension savings (which have not been designated into drawdown) from a UK registered pension scheme
- Transferring from a defined contribution or money purchase scheme
- Sure that you will not lose valuable benefits from your existing scheme by transferring. If you are unsure, you should obtain advice from a financial adviser.

Please complete all the appropriate sections in **BLACK** ink and **CAPITAL LETTERS**.

**1. YOUR DETAILS**

Existing Plan number	N	W	S	H	P										0	1
Mr/Mrs/Miss/Ms/Other	<input type="text"/>															
Surname	<input type="text"/>															
Forename(s)	<input type="text"/>															
Address	<input type="text"/>															
															Postcode	
Contact telephone number	<input type="text"/>															

**Confirming your identity**

To protect you and us from financial crime, we may need to confirm your identity from time to time. Please refer to the accompanying Verification list which details the forms of documentation we require, and who can certify your documentation. Please send us two forms of documentation, one from List A and one from List B. This documentation must be a certified copy or an original.

## 2. TRANSFER PAYMENT

Please complete the following details relating to the transferring scheme.

Name of scheme trustees or administrator

Their address

Postcode

Plan number

Pension scheme name

Estimate transfer value (the minimum that can be transferred is £20) £

## 3. INVESTMENT DETAILS

Please select the fund(s) in which you would like this transfer to be invested by completing the table below. If you do not make an investment choice, your transfer will be invested in the LF Tracker Pension Fund.

Fund	% Investment split Transfer payment
LF Tracker Pension Fund	%
LF Corporate Bond Pension Fund	%
LF Money Market Pension Fund	%
<b>Total</b>	100%

During the five years before your Selected Retirement Date, the pension fund will gradually be switched into the LF Money Market Pension Fund. This is known as the Security Option. For more information please see section 8 of the Plan Conditions, which can be found in the **Key Features** and **Terms and Conditions** of the LF Stakeholder Pension Scheme.

If you would like to opt out of the Security Option, please tick here

#### 4. NOMINATION OF BENEFICIARIES

As an existing member, you may have already told us who you would like to receive any death benefits, if you die. We will use the same nomination for this additional transfer into your Stakeholder Plan. If you would like to change your current nomination, or if you haven't previously made a nomination, please complete and return a new Nomination of Beneficiaries form.

#### 5. DATA PROTECTION – THIS MUST BE READ BY ALL APPLICANTS

By completing this form you consent to the processing of your personal details and other information in order to consider and process your application. If your application is successful, we will also use this information to provide services and manage our relationship with you and your financial adviser and as otherwise set out in this notice.

Your information may be disclosed to other selected third party providers for the purpose of our service provision to you and your information may be also held in or transferred to countries outside of the EU. In this event the processing will only be carried out by experienced and reputable organisations and only on terms which safeguard the security of your data and comply with the requirements of the Data Protection Act 1998. By signing this application form you consent to your details being used in this way.

We may share your personal information from your application form with fraud prevention agencies. If false or inaccurate information is provided and fraud identified, details of fraud will be passed to third parties to prevent fraud and money laundering.

We will record and monitor telephone calls with you in case we need to check we have carried out your instructions correctly and to help improve our quality of service.

We would also like to keep you informed by letter or phone about products, services or additional benefits that we believe may be of interest to you. We will not give your details to other non-Capita companies for marketing purposes. If you do not wish to benefit from this, please place a cross in this box.

We would also like to keep you informed via the email address or mobile number which you may have provided.

May we keep you informed by email?  Yes  No

May we keep you informed by mobile messaging?  Yes  No

Under the terms of the Data Protection Act 1998, you are entitled to ask for a copy of the information we hold on you, and to have any inaccuracies in your information corrected. We are allowed to charge a fee to provide you with a copy of the information we hold on you.

Please contact our Data Protection Officer at LFS, PO Box 1043, Cheltenham GL50 9JB.

**6. DECLARATION – IMPORTANT PLEASE READ AND SIGN**

For your own benefit and protection you should read the LF Stakeholder Pension Scheme **Key Features, Terms and Conditions** and the **Guide to Investment Risk and Investment Funds** before signing the declaration below. If you do not understand any point, you should speak to a financial adviser for further information. LFS can provide you with information but we cannot give you advice.

**I declare that:**

1. I wish to deal directly with LFS.
2. I confirm that LFS has not given me any advice, and I have not received any recommendation from LFS in relation to the suitability of this transfer.
3. I understand that I will be responsible for any liability against the Trust to the Scheme Administrator to pay tax which may arise because I have provided false or misleading information.
4. I confirm that for tax purposes I am a UK resident.
5. I have received, read, understood and agree to the LF Stakeholder Pension Scheme **Key Features, Terms and Conditions**, and the **Guide to Investment Risk and Investment Funds**.
6. I have read the Data Protection notice in section 5 and I agree that my personal data may be used for the purposes described and agreed.
7. I understand that, to the best of my knowledge and belief, the statements made in this application are correct and complete.
8. I authorise LFS to obtain information from the current provider of the above Plan.
9. I authorise LFS to obtain any additional information from my financial adviser to transfer funds.
10. The information I have provided in this application form is true to the best of my knowledge and belief.
11. I confirm that I have read the declaration and every answer filled in by me is correct.

**You must complete the boxes marked with crosses**

Print full name (in **BLOCK CAPITALS**)

Signature

Date 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

**Please return your completed application form with any original or certified documentation to:**

LFS  
 PO Box 1249  
 Cheltenham  
 GL50 9YL

Link Fund Solutions Limited (LFSL) is authorised and regulated by the Financial Conduct Authority. Registered Office 6th Floor, 65 Gresham Street, London EC2V 7NQ. LFSL is a wholly owned subsidiary of Link Administration Holdings Limited. Telephone 0345 055 0606. Calls may be monitored and/or recorded to protect both you and us and help us with our training. Registered in England and Wales with registered no. 01146888

[pensions.linkfundsolutions.co.uk](https://pensions.linkfundsolutions.co.uk)

Part of **Link Group**