

# MC Trustees Private Pension

## Transfer In Form

Membership Number (NPR)	
Membership Number (PR)	

*For Office Use Only*

### Part 1

- 1 Please complete this form if you want to transfer benefits from another pension arrangement to the MC Trustees Private Pension
- 2 If you are transferring benefits already in payment, then please complete our "Transfer in Drawdown" form. Please do **not** complete this form
- 3 This form gives the Trustees/Administrator of the transferring scheme the authority to provide us with the relevant information about your existing pension arrangement
- 4 We will obtain the details we require from the Trustees/Administrator of the transferring scheme and keep you up to date with progress.
- 5 If you wish to transfer more than one pension to the MC Trustees Private Pension, please complete one form per transfer

1: Personal Details		
Title: (Mr/Mrs/Miss/Other)		
Surname		
Forename/s (in full)		
Date of Birth		
Permanent Residential Address <i>(Please note: work or "care of" addresses contravene HMRC requirements)</i>	Postcode:	Address for correspondence:  Postcode:
National Insurance number		
Full Title of Transferring Scheme, and		
Policy Number		
Name and address of Administrator of Transferring Scheme		
Non Protected Rights Amount		
Protected Rights Amount		
Total Amount of Transfer Payment		

**If you have been granted Primary or Enhanced Protection or both, please provide a copy of the Certificate issued to you by HM Revenue & Customs**

Applicant's Initials

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## MC Trustees Private Pension

### Important Statement

- **It is an HM Revenue and Customs requirement to remind you that it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.**

### General declaration and agreement

*I declare that:*

- (a) to the best of my knowledge and belief the information contained in this Transfer In Application is true and complete and that this declaration and any other declaration made in connection with this Transfer In Application shall be the basis of the contract(s) with MC Trustees (Pensions) Limited.
- (b) I understand that MC Trustees (Pensions) Limited is authorised by the Financial Services Authority to operate personal pension schemes but is not authorised to give financial or investment advice, nor act as investment manager, nor accept any liability for the performance or choice of investments or performance or choice of any investment manager.
- (c) I authorise the Trustees, Administrator or Insurers of the transferring scheme to provide MC Trustees (Pensions) Limited with any information it may request in relation to any benefits provided for me.
- (d) The transferring scheme is Registered with HM Revenue and Customs.

*I hereby* agree to be bound by the governing Deed and Rules and, where applicable, the Supplemental Deed of The MC Trustees Private Pension

**I confirm that, to the best of my knowledge and belief, the details given on this Application Form are correct and complete.**

### MC Trustees Private Pension Transfer In Cancellation Rights

When transferring other pension schemes to your MC Trustees Private Pension, you have the right to change your mind within 30 calendar days of signing your application to transfer. During this period, unless you instruct us to invest, MC Trustees Limited will retain all monies in your designated SIPP bank account until the cancellation period has expired. We will send you, under separate cover, a Cancellation Notice relating to each transfer in for which you have applied.

**SIGNED**

**DATE**

- Notes:**
- 1 Only Transfer In Application forms that have been signed and dated can be processed**
  - 2 All questions must be answered**
  - 3 Further information will be required if you are drawing a pension form the transferring arrangement**
  - 4 The completed Transfer In Application form should then be returned to:-**

**MC Trustees (Pensions) Limited  
Enterprise House  
Meadow Drive  
Hampton-in-Arden  
West Midlands B92 0BD  
Tel 01675 444600  
Fax 01675 444601  
Email mail@mctrustees.co.uk**

# MC Trustees Private Pension

## Part 2

### NON PROTECTED RIGHTS ONLY

This part is to be completed by the Trustees/Administrator of the transferring scheme

Name of Scheme

Pension Scheme Tax Reference Number

Is this scheme a "recognised overseas pension scheme" for the purpose of Part 4 of the Finance Act 2004? YES / NO

**If any part of the transfer value supports a Pension Sharing Order, we cannot accept that part of the transfer value which supports the Pension Sharing Order. The MC Trustees Private Pension will only accept transfer values which are wholly in respect of the member's benefits.**

By signing the Warranty at the foot of this form, you confirm that no part of the Non-Protected Rights transfer value supports a Pension Sharing Order.

Is this transfer part of a block transfer (within the meaning of Schedule 36 of the Finance Act 2004)? YES / NO

If the answer to this question is "yes" please confirm how many other members' benefits are being transferred as part of this transaction

Please also confirm that all of this member's pension rights under the transferring Scheme are being transferred as part of this transaction YES / NO

#### Transitional Provisions

1 Is the member entitled to a protected pension commencement lump sum of more than 25% of the transferred funds? YES / NO

2 If "Yes", please confirm the following:

(a) the amount of the member's protected lump sum under your scheme at 5 April 2006

(b) the value of the member's total uncrystallised pension rights under your scheme at 5 April 2006

(c) Whether there has been any relevant benefit accrual under your scheme in respect of the member since 5 April 2006 YES / NO

3 Is the member entitled to a protected minimum pension age (below age 55) under transferring scheme? YES / NO

If "Yes", please confirm the earliest age at which the member may draw benefits \_\_\_\_\_

4 Please confirm that no part of the transfer value represents:

(a) Protected Rights or other Contracted-Out benefits (see separate page for details of any Protected Rights included in this transfer)

(b) Rights that have already crystallised under your scheme for Lifetime Allowance purposes



## MC Trustees Private Pension

### PROTECTED RIGHTS ONLY

Name of Scheme

Pension Scheme Tax Reference Number

Total transfer amount  Scheme Contracting Out Number

If tax free cash has been paid, please confirm amount paid

**If any part of the Protected Rights transfer value supports a Pension Sharing Order, we cannot accept that part of the transfer value which supports the Pension Sharing Order. The MC Trustees Private Pension will only accept transfer values which are wholly in respect of the member's benefits.**

By signing the Warranty at the foot of this form, you confirm that no part of the Protected Rights transfer value supports a Pension Sharing Order.

#### Transferring Scheme Trustee/Administrator Warranty

I certify on behalf of the transferring scheme that the information on this transfer application is correct. I certify that no part of the transfer value shown represents rights under this scheme that have already crystallised for Lifetime Allowance purposes. I will arrange for payment of the transfer value or assets in specie to the MC Trustees Private Pension. This certification is made in line with the legislation currently in force for transfers to registered pension schemes.

Signed \_\_\_\_\_

Position \_\_\_\_\_

For and on behalf of \_\_\_\_\_

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Please return the completed form to

MC Trustees (Pensions) Limited  
Enterprise House  
Meadow Drive  
Hampton in Arden  
West Midlands B92 0BD  
Tel 01675 444600  
Fax 01675 444601  
Email [mail@mctrustees.co.uk](mailto:mail@mctrustees.co.uk)