



HERITAGE PENSIONS

PENSION CREDIT TRANSFER REQUEST

PLEASE RETURN THIS FORM TO:

Heritage Pensions Limited
6 Doolittle Mill
Froghall Road
Amphill
Bedfordshire
MK45 2ND

1 Details of Person Receiving the Pension Credit

Title Mr Mrs Miss Ms Other

Name

Permanent residential address

Postcode

Date of birth

National insurance number

2 Details of the Heritage SIPP Member from which the Pension Debit will be Made

SIPP reference number

Title Mr Mrs Miss Ms Other

Name

Permanent residential address

Postcode

National insurance number



3 Details of Pension Scheme to Receive the Pension Credit

I wish to transfer my rights under the Pension Sharing Court Order to the following Registered Pension Scheme

Scheme name

Scheme address

HMRC reference number
(if known)

Your reference number
if already given to you

4 Declaration

I confirm that to the best of my knowledge and belief the particulars given on this form are correct and complete

I accept that all my pension credit rights will be encashed before the transfer is made

I understand that it is an offence to make false statements and that the penalties are severe and could lead to prosecution

I agree to indemnify Heritage Pensions Limited and Heritage Trustees Limited against any tax charge, penalty or other loss in the event that the receiving scheme is not a registered pension scheme

I acknowledge that on payment of the transferred rights to the receiving scheme I will cease to have any rights to benefits under this plan and Heritage Pensions Limited will be fully discharged from any obligation in respect of those rights.

Signature

Dated



5 Receiving Pension Scheme Details

Member's name

Your plan reference

Name of scheme

HMRC reference number

As administrators of the above scheme, we confirm that the above scheme is:
(please tick the statement that applies)

A Registered Pension Scheme accepted under Chapter 4 of the Finance Act 2004 and in the case of crystallised rights capable of accepting transfers of crystallised rights.

A Qualifying Recognised Overseas Pension Scheme as defined by HMRC under Chapter 4 of the Finance Act 2004 and has satisfied HMRC requirements in this respect.

Transfer payment details

By direct credit:

Sort code

Account number

Account name

Payment reference

Bank name and address

Postcode

or

Cheque payable to:



6 Receiving Scheme Declaration

We confirm that the above statements are true and complete. On receipt and acceptance of the transfer value it will be applied to provide benefits for or in respect of the member under the receiving scheme.

Signature	<input type="text"/>	
Dated	<input type="text"/>	
For and on behalf of (print scheme name)	<input type="text"/>	
Scheme address	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	Postcode <input type="text"/>

