



**HERITAGE
PENSIONS**

**TRANSFER OUT
INFORMATION SHEET**

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

1 Member Details

Name	<input type="text"/>	
Permanent residential address	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	Postcode <input type="text"/>
Date of birth	<input type="text"/>	
National insurance number	<input type="text"/>	

2 Scheme Details

Name of transferring scheme	<input type="text"/>	
Administration address	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	Postcode <input type="text"/>
PSTR number	<input type="text"/>	

payment comes from a Registered Pension Scheme approved under Part 4 of the Finance Act 2004.

3 Transfer Information

<p>Divorce Does the transfer include benefits arising from divorce/dissolved civil partnership?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Earmarking Is there an earmarking order attached to the plan?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>Protection Is there any primary, fixed or enhanced protection?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown <input type="checkbox"/></p>
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Date of transfer

Total transfer value

Assets included in the transfer

Cash

Property (transfer in-specie)

Investment (transfer in-specie)

4 Drawdown Information

Amount of transfer value crystallised LTA%

Is the crystallised fund flexi or capped? Flexi Capped

On what date was the fund first designated to flexi-access?

Has the Money Purchase Annual Allowance rules been triggered? Yes No

If Yes, what date was it triggered?

Date crystallised	Next review date <i>(*see note)</i>	Fund crystallised	Current maximum gross income <i>(*see note)</i>	Gross income paid in current GAD year	Tax free cash paid
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

**Only relevant if in 'capped drawdown'*

