

Transfer Form

Bank of Scotland Share Dealing Self Invested Personal Pension



Transferring Member Instructions

This form is an application to transfer benefits from another registered pension scheme into a Bank of Scotland Share Dealing SIPP administered by A J Bell Management Limited (the "receiving scheme"). This form is supplementary to the Application Form completed by the transferring member.

If you would like a copy of this or any other item of our other literature in large print, Braille or in audio format, please contact us on 0845 606 1188 or by e-mail: bossipp@sippdeal.co.uk.

You must complete all of the details requested on the following page and sign the declaration.

If the transfer is to be made in the form of a cash amount from the transferring scheme (a 'cash transfer') the form must be forwarded to the scheme administrator of the transferring scheme. Please do not return this form directly to us if a cash transfer is being made.

If the transfer is to take the form of the transfer of cash and other assets/investments (an 'in-specie transfer') the form must be returned to us at the address below.

The Bank of Scotland Share Dealing SIPP Administration Team
A J Bell Management Limited
Trafford House
Chester Road
Manchester
M32 0RS

Tel: 0845 606 1188
Fax: 0845 54 32 601

To be completed by the Transferring Member

Full Name of Member

* Date of Birth

Your SIPP Ref. (if known)

Transferring Scheme Name

Member's Ref. or Policy No. under Transferring Scheme

Name of Administrator of Transferring Scheme

Address of Administrator of Transferring Scheme

Town County

Post Code Country

Is the transferring scheme a final salary pension scheme?

Yes No

If yes, please note that we will not accept transfers from final salary pension schemes unless you have received advice on the transfer from a suitably qualified financial adviser.

Have you received advice from such an adviser?

Yes No

Is the transfer cash only?

Yes No

Is the transfer to contain protected rights?

Yes No

For an in-specie transfer, please provide the name and address of the existing investment manager/stockbroker below (if applicable). Please also complete the list of the assets to be transferred and their values in the assets to be re-registered section below. If this section is not completed this may lead to delays in processing the transfer.

Name of Investment Manager / Stockbroker

Address of Investment Manager / Stockbroker

Town County

Post Code Country

Transferring Scheme Instructions

If you require any further forms to be completed by the transferring member please contact the member directly.

For a cash transfer, your cheque must be made payable to 'Sippdeal Trustees Limited re [insert name of transferring member]' and sent to the address shown above.

For all transfers you must provide us with full details of the benefits being transferred. The information that you provide must confirm:

- That the transferring scheme is a registered pension scheme under Finance Act 2004.
- The transferring scheme's HMRC Pension Scheme Tax Reference.
- The Total Transfer Value.
- Whether the transfer contains any protected rights/contracted out benefits and, if so, full details of them.
- Whether the transfer contains any crystallised benefits and, if so, full details of them.
- Details of any transitional protection relating to the benefits or the transferring member and, if relevant, whether the transfer is part of a block transfer.
- Whether the transfer value derives from a Pension Sharing Order or Provision, or whether an Earmarking Order is in force in relation to the transferring benefits.

For all transfers you must also return this Transfer Authority Form, or a copy of it, to us at the address shown above.

The Bank of Scotland Share Dealing SIPP is administered by A J Bell Management Limited. A J Bell Management Limited is registered in England No. 3948391. Registered Office: Trafford House, Chester Road, Manchester, M32 0RS. Authorised and regulated by the Financial Services Authority. Sippdeal Trustees Limited is a wholly owned subsidiary of A J Bell Management Limited, registered in England No. 4050222. Registered Office: Trafford House, Chester Road, Manchester, M32 0RS. Sippdeal Trustees Limited does not conduct any regulated activities, and is, therefore, not regulated.

Halifax Share Dealing Limited trading as the Bank of Scotland Share Dealing Service. Halifax Share Dealing Limited is part of the HBOS Group. Registered in England No.3195646. Registered Office: Trinity Road, Halifax, West Yorkshire, HX1 2RG. Authorised and regulated by the Financial Services Authority, 25 The North Colonnade, Canary Wharf, London E14 5HS. A Member of the London Stock Exchange and an HM Revenue & Customs Approved ISA Manager.

