

Alliance Trust Full SIPP

Transfer details form (from 6 April 2008)

If you are to arrange a transfer payment to your Alliance Trust Full SIPP please complete this form then return it to Alliance Trust Savings Limited, PO Box 164, Meadow House, 64 Reform Street, Dundee DD1 9YP. If you have not already completed the application form, please complete and sign it and return it to us with this form. If you are to arrange more than one transfer, you must use a separate transfer details form for each transfer.

PLEASE COMPLETE IN BLOCK CAPITALS AND BLACK INK

Part 1 please complete this part in all cases

(a) Name of transferring scheme	<input type="text"/>						
(b) Amount of transfer payment	£ <input type="text"/>	Note: The transfer value must not include any amount in respect of contracted-out rights.					
(c) Income drawdown	Are you currently taking income drawdown (unsecured pension or alternatively secured pension) from the transferring scheme?						
	<input type="checkbox"/> Yes	<input type="checkbox"/> No	If No , please proceed to (d)				
	If Yes , is the whole of your pension fund being used for income drawdown?						
	<input type="checkbox"/> Yes	<input type="checkbox"/> No					
(d) Name/address of the transferring scheme or insurance company	<input type="text"/>						
	<input type="text"/>						
	<input type="text"/>	Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Your reference or policy number	<input type="text"/>						
(f) Investment of the transfer payment	On receipt of the transfer payment it will be paid into your SIPP bank account. Please indicate below if you would like any/all of the transfer payment to be invested in any particular way. If you do not indicate how you would like the transfer payment to be invested then it will remain in your SIPP bank account, earning interest, until you ask us to arrange for it to be invested.						
	Please arrange for the transfer payment to be invested as follows:						
	<input type="text"/>						
	<input type="text"/>						
	<input type="text"/>						
(g) Transfer from another SIPP	Is this transfer from another self-invested personal pension (SIPP)?						
	<input type="checkbox"/> Yes	<input type="checkbox"/> No					
	If Yes , please proceed to (i)						

(h) Lump sum protection as part of a block transfer Is this transfer part of a block transfer from an occupational pension scheme where you are entitled to a lump sum in excess of 25% of your transfer value?
 Yes No

(i) Transfer in respect of a divorce settlement Is this transfer in respect of a divorce settlement?
 Yes No *If No, please proceed to (j)*
 If Yes, does it relate to benefits that are already in payment?
 Yes No

(j) Tax-free cash/income drawdown Are you over 50 and want to take a tax-free cash sum and/or income drawdown when this transfer payment has been accepted by us?
 Yes No

(k) Transfer in-specie Will any part of the transfer be an in-specie transfer of assets?
 Yes No
 If Yes, please provide a copy of the latest valuation you hold showing details of the assets to be transferred. Please proceed to Part 2 below. Alliance Trust Savings Limited will arrange the transfer and will quote the fee for this before proceeding.

(l) Who will arrange the transfer? Would you like Alliance Trust Savings Limited to arrange the transfer?
 Yes No
 If Yes, please complete the declaration in Part 2 below. There will be a fee of £100 (plus VAT) for arranging the transfer.
 If No, you, or your adviser, will be responsible for arranging the transfer. There will be no fee for processing the transfer. Please complete the declaration in Part 2 below, and then arrange the transfer as indicated in Part 3.
 No benefits will be due under the Alliance Trust Full SIPP until we receive all the forms and accept the transfer payment.

Part 2 Declaration

I confirm that this form relates to a proposed transfer to my Alliance Trust Full SIPP.

I request the transferring scheme, or insurance company, specified above to transfer the value of my benefits to the Trustee and Scheme Administrator of the Alliance Trust Personal Pension Plan, and to accept instructions in respect of the transfer on my behalf from Alliance Trust Savings Limited and to disclose all information relevant to the transfer to them.

I accept that the Trustee and Alliance Trust Savings Limited are unable to advise me on the merits of the transfer and I confirm that I have not received any advice in respect of the proposed transfer from the Trustee, Alliance Trust Savings Limited or from any of their employees.

I understand that the actual amount or value of the transfer payment may change between the date of my request and the date that it is received by the Trustee or Alliance Trust Savings Limited.

I am satisfied that the consequences of this transfer on protection of my pension entitlements that arose before 6 April 2006 are acceptable to me.

I understand that if I have requested Alliance Trust Savings Limited to arrange the transfer, Alliance Trust Savings Limited will make a charge for arranging the transfer. I understand that if I or my adviser are to arrange the transfer then it is my responsibility to ensure completion of all the actions set out in Part 3 of this form.

I authorise Cater Allen Private Bank to transfer funds, up to the value of the transfer payment, from my SIPP bank account to the investment specified in Part 1(f) above on the basis of instructions from the Trustee or Alliance Trust Savings Limited.

To the best of my knowledge and belief all information given on this form is true, correct and complete.

Member's name

Member's signature

Date

D	D	M	M	Y	Y
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For security and compliance monitoring purposes telephone calls may be recorded.

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