



Pension credit transfer request form

Please complete this form in BLOCK CAPITALS and return it by:

- **post** to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- **secure message** via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

Using this form

The person receiving the pension credit should complete Sections 1-4 of this form. Once complete, please forward it to your chosen pension provider to complete Sections 5-6.

If the transfer is to a Qualifying Recognised Overseas Pension Scheme (QROPS) please also complete the **Transfer Out Request Form**, available on our website at literature.nucleusfinancial.com.

Please note: Before you disclose personal information about a third party in this form, please ensure you have their permission and have informed them of the purposes for which their information will be processed.

Section 2 - Details of the Nucleus product from which the pension debit will be made

Customer's full name

Nucleus product name

Nucleus product number

National Insurance number

Section 1 - Details of person receiving the pension credit

Full name

National Insurance number

Permanent residential address

Postcode

Section 3 - Details of pension scheme to receive pension credit

I instruct Nucleus to transfer my rights under the Pension Sharing Court Order to the following Registered Pension Scheme:

Scheme name

Scheme address

Postcode

HM Revenue and Customs (HMRC) reference number (if known)

Your reference (if already given to you)

Section 4 - Declaration

I confirm that to the best of my knowledge and belief, the information given on this form is correct and complete.

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

I acknowledge that any entitlement to benefits under this plan will cease in respect of any transferred rights, and Nucleus will be discharged from any obligation to provide benefits in respect of those rights.

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

Signature

Date (DD/MM/YYYY)

Please now forward this form to your chosen pension provider to complete Sections 5-6, if applicable.

Section 5 - Receiving pension scheme details

Customer's name

Your product reference

Name of scheme

HMRC reference number

As administrators of the above scheme, we confirm that the above scheme is:

a Registered Pension Scheme accepted under Chapter 4 of the Finance Act 2004 and in the case of crystallised rights is capable of accepting transfers of crystallised rights,
or

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.

Receiving pension scheme payment details

By direct credit:

Sort code

Account number

Account name

Payment reference

Bank name and address

Postcode

Cheque payable to

Section 6 - Receiving scheme declaration

We confirm that the above statements are true, and upon receipt and acceptance of the transfer value, it will be applied to provide benefits for the customer under the receiving scheme.

We give Nucleus permission to approach HMRC for confirmation that this scheme is a Registered Pension Scheme/Qualifying Recognised Overseas Pension Scheme, as appropriate.

Signature


Date (DD/MM/YYYY)

For and on behalf of (print scheme name)


Scheme address

Postcode

Please forward the completed form to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB.

 03455 212 414

 ask@nucleusfinancial.com

 nucleusfinancial.com

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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