talbotandmuir

SSAS takeover member details form

The information supplied will be held in the strictest confidence and subject to General Data Protection Regulation.

Failure to provide and complete the full correct information may result in a delay in processing the takeover of the scheme or could result in the application being rejected.

1 Member details

Title

Surname

Forenames (in full)

Date of birth

Place/country of birth

Nationality

Sex

Marital status

Spouse's/partner's name

Spouse's/partner's date of birth

Permanent residential address

Post code

Date moved to this address

If you have lived at the above address for less than 3 years, please also give details of your previous address

Home number

Mobile number

Office number

Email address

National insurance number

Intended retirement age

2 Status

In order to ascertain your membership status, please tick ONE of the following:

- **1. Employed persons.** A person chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Earnings and Pensions) Act 2003 for the tax year concerned in respect of employment income as defined in the Act.
- **2. Pensioners.** A person chargeable to tax under Part 9 of the Income Tax (Earnings and Pensions) Act 2003 for the tax year concerned in respect of a pension.
- **3. Self-Employed persons.** A person chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Trading and Other Income) Act 2005 for the tax year concerned in respect of annual profits or gains arising or accruing from any trade, profession or vacation carried out by an individual.
- **4. Children.** A child under 16. (SSAS members must be over the age of 18)
- **5. Any others** not falling **1, 2, 3 or 4** above, please select below

Caring for one or more children aged under 16	Caring for one or more children aged under 16
In full-time education	Unemployed
Retired	Other

If other, please provide details

Employment details, if you have ticked either Box 1 or Box 3 on the above, please give the full name and address of your employer if employed, or your trading details if self-employed.

Employer's name

Nature of business

Employer's address

Postcode

Office number

Date employment commenced

Date joined this scheme

Earnings/profits in current tax year

3 Transitional protection

I have the following type(s) of former lifetime allowance protection or, if any apply please provide a copy of the enhancements certificate along with this application:

- **1. Transactional Tax Free Amount Certificate**
- **2. Enhanced protection** — My certificate reference number is
- **3. Primary protection** — Uncrystallised lump sum rights on 5 April 2006
  - My certificate reference number is
  - Primary protection factor
- **4. Fixed Protection 2012** — My certificate reference number is
- **5. Fixed Protection 2014** — My certificate reference number is
- **6. Individual protection 2014** — My certificate reference number is
- **7. Fixed Protection 2016** — My certificate reference number is
  - Pension Scheme Administrator reference number is
- **8. Individual Protection 2016** — My certificate reference number is
  - Pension Scheme Administrator reference number is
- **9. Pension credit factor** — My certificate reference number is
- **10. International enhancement** — My certificate reference number is

4 Contributions

Do you wish to make contributions? ☐ Yes ☐ No

Regular contributions £ _____ Member (net) £ _____ Member (gross)

Employer contributions £ _____ Employer (gross)

This will be paid (Frequency) _____

Single contributions £ _____ Member (net) £ _____ Member (gross)

Employer contributions £ _____ Employer (gross)

Date Money Purchase AA* applicable _____ _____ _____

*Money Purchase Annual Allowance (AA) is £10,000. It is applicable if you access any pension arrangement under Flexi-access Drawdown and take an income or received an uncrystallised funds pension lump sum.

5 Details of transferring schemes

Please detail all contributions and transfers received by the scheme for this member.

Date	Contribution/Transfer?	Source	Amount

Should you need more space please provide on a separate sheet.

6 Benefit crystallisation events

If this member has crystallised any benefits within the pension scheme please provide the following information.

Date benefit taken?

PCLS taken? Yes No

% of LTA or amount of Lump Sum Allowance and Lump Sum Death Benefit Allowance used?

Type of benefit (UFPLS, Capped, Flexi)

Max GAD (if applicable)

Current income being taken

Last GAD review (if applicable)

Next GAD review (if applicable)

Date benefit taken?

PCLS taken? Yes No

% of LTA or amount of Lump Sum Allowance and Lump Sum Death Benefit Allowance used?

Type of benefit (UFPLS, Capped, Flexi)

Max GAD (if applicable)

Current income being taken

Last GAD review (if applicable)

Next GAD review (if applicable)

Should there be more information, please provide it on a separate sheet.

Privacy information

We take the privacy and security of your personal information very seriously. The information you (or a third party) provide us with will be processed in accordance with our Privacy Notice.

Declaration

To be completed by the sponsoring employer/trustee. (please tick each box and sign below)

- I hereby confirm that I have read and understood the Privacy Notice and that I understand that Talbot and Muir and the corporate trustee will obtain, record, process and hold information and other such personal data as may be required to administer my pension benefits in the SSAS in accordance with our Privacy Notice which you can access here - nucleusfinancial.com/privacy-notice.
- I also understand that Talbot and Muir may disclose to a third party such information about members of the SSAS as may be required by that third party to enable them to trace a member's whereabouts in the future should they be unable to do so and require their assistance.
- Where I disclose personal data relating to employees who are going to participate in the SSAS (or other individuals, such as people connected to those employees or employees who are involved in the administration of the SSAS), I am lawfully entitled to disclose this information to you for the purposes of you establishing and operating the SSAS or such other purposes as I provide the information to you for, and I have informed the relevant individuals that I have provided the information to you and provided them with a link to your Privacy Notice (or a copy of it).

Signed

Name

Date

For literature in alternative formats, such as Braille, large print, audio or E-Text, please call us on 0115 841 5000 (or via Relay UK on 18001 0115 841 5000).

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