

# OPTION SIPP AND FULL SIPP TRANSFER AUTHORITY FORM

Please complete this form in BLOCK CAPITALS and black ink and return it to: Embark Pensions, Dunscair House, Deakins Business Park, Egerton, Bolton BL7 9RP. If you need assistance in completing this form, please call our Customer Services team on 01204 803500.

You will need to complete this form to transfer benefits from another pension arrangement to your SIPP. You will need to complete one form for each transfer you wish to make.

## Beware of Pension Scams

Falling foul of a scam could mean you lose some or all of your money. See [pension-scams.com](http://pension-scams.com) or [fca.org.uk/scamsmart](http://fca.org.uk/scamsmart) or visit our website at [embarkpensions.co.uk](http://embarkpensions.co.uk) for more information.

### 1 MEMBER DETAILS

Client Ref:	Title:
<hr/>	
Forename(s):	
<hr/>	
Surname:	
<hr/>	
Date of Birth:	National Insurance Number:
<input type="text" value="  D   D   M   M   Y   Y   Y   Y  "/>	<hr/>
Permanent Residential Address:	
<hr/>	
Postcode:	
<hr/>	

### 2 TRANSFER DETAILS

Transferring Scheme Name:	
<hr/>	
Transferring Scheme Address:	
<hr/>	
Postcode:	
<hr/>	
Scheme or Policy Number:	
<hr/>	
Please tick the appropriate box describing the type of Ceding Scheme.	
Fully invested in insurance policies with the provider named above <input type="checkbox"/>	Defined Benefit Occupational Pension Scheme <input type="checkbox"/>
Small Self Administered Scheme (SSAS) <input type="checkbox"/>	Qualifying Recognised Overseas Pension Scheme <input type="checkbox"/>
Self-Invested Personal Pension (SIPP) <input type="checkbox"/>	Money Purchase Occupational Pension Scheme <input type="checkbox"/>
Personal Pension Plan (inc. Stakeholder) <input type="checkbox"/>	Other (please state): <input type="checkbox"/>
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## 2 MEMBER DECLARATION

This form gives Embark Pensions the authority to contact your current pension provider and to arrange the transfer of benefits from them to your SIPP.

This form also gives the transferring pension arrangements authority to give us details of your current arrangements and any relevant paperwork they require in order to transfer.

This form authorises us to request the transfer using the Origo Options Service if this is available.

Do you wish for your adviser to be paid a fee from this particular transaction?  Yes  No

If yes, fee amount: £  OR  %

Please do not include the adviser fee if we've already been made aware of your advisers fees on your new SIPP application form.

Signature: 

Print Name:

Date:  |  |  |  |  |

### Your Right to Cancel the Transfer

As we are regulated by the Financial Conduct Authority you have a right to cancel the transfer within 30 days from the date that we receive your transfer request. You will receive this in writing once we have opened the SIPP. If you did want to exercise this right you can do this by emailing us at [customerservices@embarkpensions.co.uk](mailto:customerservices@embarkpensions.co.uk) or by calling **01204 803500**. Alternatively you can write to us at Embark Pensions, Dunscair House, Deakins Business Park, Egerton, Bolton BL7 9RP.

If you do decide to cancel the transfer we will do our best to try and return any funds we have received to the transferring scheme although we cannot guarantee that they will accept them back. In this circumstance we would transfer funds to a scheme of your choice and would do this free of charge. In addition, if funds have been invested prior to the cancellation request you may get back less than you transferred.

Please note that this right to cancel is a different one to that of the right to cancel the membership.



 01204 803500

 Dunscair House, Deakins Business Park,  
Egerton, Bolton BL7 9RP

 [customerservices@embarkpensions.co.uk](mailto:customerservices@embarkpensions.co.uk)

 [embarkpensions.co.uk](http://embarkpensions.co.uk)