

TRANSFER AUTHORITY FORM

FOR HORNBUCKLE MITCHELL SIPP | HORNBUCKLE MITCHELL PRIVATE PENSION | THE PRIVATE PENSION | FLEXIBLE INCOME PENSION PLAN | FREEDOM SIPP

Please complete this form in BLOCK CAPITALS and black ink and return it to: Embark Pensions, Tyman House, 42 Regent Road, Leicester LE1 6YJ. If you need assistance in completing this form, please call our Customer Services team on 0116 366 8600.

You will need to complete this form to transfer benefits from another pension arrangement to your pension. 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 or fca.org.uk/scamsmart or visit our website at embarkpensions.co.uk for more information.

1 MEMBER DETAILS

Client Ref: _____ Title: _____

Forename(s): _____

Surname: _____

Date of Birth: | D | D | M | M | Y | Y | Y | Y | National Insurance Number: _____

Permanent Residential Address: _____

Postcode: _____

2 TRANSFER DETAILS

Transferring Scheme Name: _____

Transferring Scheme Address: _____

Postcode: _____

Scheme or Policy Number: _____

Please tick the appropriate box describing the type of Ceding Scheme.

| | |
|--|---|
| Fully invested in insurance policies with the provider named above | Defined Benefit Occupational Pension Scheme |
| Small Self Administered Scheme (SSAS) | Qualifying Recognised Overseas Pension Scheme |
| Self-Invested Personal Pension (SIPP) | Money Purchase Occupational Pension Scheme |
| Personal Pension (inc. Stakeholder) | Other (please state): _____ |

5 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 pension.

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 pension. If you did want to exercise this right you can do this by emailing us at sippservicing@embarkpensions.co.uk or by calling **0116 366 8600**. Alternatively you can write to us at Embark Pensions, Embark Pensions, Tyman House, 42 Regent Road, Leicester LE1 6YJ.


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.



 0116 366 8600

 0845 125 5600

 sippservicing@embarkpensions.co.uk

 Embark Pensions, Tyman House,
42 Regent Road, Leicester LE1 6YJ

 embarkpensions.co.uk/closed-products