



LONDON &  
COLONIAL

INNOVATION YOU CAN TRUST

## CORPORATE OPEN PENSION - TRANSFER REQUEST

### 1. To be completed by the Applicant

WARNING: It is an offence to give false information

Policyholder/Scheme Member

First name (in full)

Middle name(s)

Surname

Date of birth

National Insurance number

Name of transferring scheme or policy

Policy number(s)

Estimated transfer value

Administrators of transferring scheme / policy

Name

Address line one

Address line two

Town

County

Country

Postcode

Telephone number

Fax number

Please complete the relevant information requested overleaf and return this form to the Corporate Open Pension Scheme Administrator

London & Colonial, 38 – 42 Perrymount Road, Haywards Heath, West Sussex RH16 3DN.

## 2. Declaration by Policyholder/Scheme Member

In respect of benefits already in payment

- I hereby confirm that an Unsecured Pension (USP) or an Alternatively Secured Pension (ASP) is currently being taken from the transferring registered pension scheme
- I hereby elect to defer purchase of an annuity and take an USP/ASP in accordance with the Finance Act 2004 as amended
- I understand that:
  - No Pension Commencement Lump Sum is available from the Corporate Open Pension at any time
  - No contribution may be paid to the Corporate Open Pension
  - No further transfers can be accepted into the Corporate Open Pension unless the transfer is from another registered pension scheme in USP

General declarations

- I consent to London & Colonial obtaining details from the Scheme Administrator/Scheme Trustee or Insurance Company or other Pension Provider of any scheme, arrangement or contract of which I am or have been a Member and authorise the giving of such details to London & Colonial.
- I wish to transfer my entitlement under the above scheme to the London & Colonial Pension Scheme (marketed as the "Corporate Open Pension"), which is registered with HM Revenue & Customs under ref: 00769242RC
- I understand that after such payment neither I nor my spouse, civil partner, financial or other dependants will have any entitlement to benefits under the registered pension scheme to which this transfer payment relates

Signed

Dated

