

**GEN2596 1220**

- Please complete and attach to all DB to DC transfer requests.
- This form should be completed in addition to the normal application process.
- A form should be completed for each DB pension transfer.
- Completing this form will ensure we recognise it is a Defined Benefit transfer and can prioritise accordingly to ensure guarantee deadlines are met.
- We will not accept transfer requests where the advice outcome was not to transfer.

**Send to:**

**Standard Life  
Standard Life House  
30 Lothian Road  
Edinburgh  
EH1 2DH**

### Financial adviser details

Contact name	<input type="text"/>
Contact number	<input type="text"/>
Email	<input type="text"/>
	@ <input type="text"/>
FCA registration number	<input type="text"/>
Standard Life/ Elevate Consultant	<input type="text"/>

DB Scheme	<input type="text"/>
DB Scheme Plan Number	<input type="text"/>
DB Transfer Value	£ <input type="text"/>
DB Transfer Guaranteed Date	<input type="text"/>

Block Transfer (Y/N)    Yes     No

If a block transfer, please provide details of the other client's name:

Other client's date of birth:

Other client's national insurance number:

Please advise of special instructions e.g. a specific TPA address which differs from the paperwork

Confirmation that client has been set up on WRAP (if applicable)    Yes     No

Please provide the WP number

Is client moving immediately to drawdown?    Yes     No

**Outcome of Advice**

Please confirm the outcome of the advice process by ticking **Yes** or **No** below.

Was the outcome of the advice given supportive of this transfer?    Yes     No

Please note **we will not** accept transfer requests where the advice outcome was not to transfer.

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