

# Self Invested Personal Pension Transfer Certificate

## Drawdown to Drawdown Transfer Certificate

**SLSIP32A 1211**

### Filling in this form

Before we can accept a transfer payment of a Drawdown Pension Fund, we need to know the answers to the questions asked in this certificate. The scheme administrator of the transferring scheme can either complete this certificate or provide the answers to us in writing.

### Part 1 - Member's details

Plan number	<input type="text" value="D"/>	
National Insurance No.	<input type="text"/>	Date of birth (DD/MM/YYYY) <input type="text"/>
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)		Surname
First Name(s)		

### Part 2 - Transferring scheme

Name of scheme	Scheme administrator
Address of scheme administrator	
Postcode	
Telephone number of scheme administrator (include area dialling code)	
Email address	

### Part 3 - Drawdown details

Did the member's income drawdown start before 6 April 2006?

Yes  No

**If Yes, complete section A with details of their pre 6 April 2006 income drawdown (and section B with details of any income drawdown that started after 5 April 2006).**

**If No, go straight to section B.**

#### Section A – Pre 6 April 2006 income drawdown

1. Current value of the pre 6 April 2006 income drawdown fund  £

2. How much of this is protected rights?  None  All  £

3. Is this a dependant's fund?  Yes  No

If Yes, give

(a) the date of birth of the original member Date (DD/MM/YYYY)

(b) the date of death of the original member Date (DD/MM/YYYY)

4. When does the next income year start? Date (DD/MM/YYYY)

5. Is the current income year part of a 5-year review period?  Yes  No

If 'Yes', we'll recalculate the maximum income for the start of the next income year.

If 'No', when is the next review date? Date (DD/MM/YYYY)

6. What is the current maximum income?  £

7. How much gross income have you already paid out in this income year?  £

8. Have you already calculated the maximum income for the next income year?  Yes  No

If 'Yes', what is the maximum income for the next income year?  £

Question 8 is relevant if part of the pre April 2006 income drawdown fund has been shared on divorce, or used to buy an annuity, during the income year.

**Part 3 - Drawdown details (continued)**

**Section B – Post 5 April 2006 income drawdown**

Does more than one review date apply to the income drawdown fund created after 5 April 2006?  Yes  No

**If Yes, complete a separate table for each part of the Drawdown Pension Fund to which a different review date applies. If there are more than two review dates, please photocopy this page and, when complete, attach it to this certificate.**

**If No, just complete Table 1.**

**Table 1**

1. Current value of the Drawdown Pension Fund to which this table applies		£	<input type="text"/>
2. How much of this is protected rights?	<input type="checkbox"/> None <input type="checkbox"/> All	£	<input type="text"/>
3. Is this a dependant's fund?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If Yes, give			
(a) the date of birth of the original member	Date (DD/MM/YYYY)		<input type="text"/>
(b) the date of death of the original member	Date (DD/MM/YYYY)		<input type="text"/>
4. When does the next income year start?	Date (DD/MM/YYYY)		<input type="text"/>
5. Is the current income year part of a 5-year review period?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If 'Yes', we'll recalculate the maximum income for the start of the next income year.			
If 'No', when is the next review date?	Date (DD/MM/YYYY)		<input type="text"/>
6. What is the current maximum income?		£	<input type="text"/>
7. How much gross income have you already paid out in this income year?		£	<input type="text"/>
8. Have you already calculated the maximum income for the next income year?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If 'Yes', what is the maximum income for the next income year?		£	<input type="text"/>
9. What was the value of the Drawdown Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase.)		£	<input type="text"/>
10. How much of the Lifetime Allowance was used up by:			
(a) the fund designated for income drawdown			<input type="text"/> %
(b) the associated tax-free lump sum			<input type="text"/> %

If the Drawdown Pension Fund includes protected rights and non-protected rights that share the same review date but belong to separate arrangements, please complete a separate table for the protected rights.

Question 8 is relevant if part of this drawdown pension fund has been shared on divorce, or used to buy an annuity, during the income year. It's also relevant if a reduction in the maximum income has been deferred to the start of the next income year.

### Part 3 - Drawdown details (continued)

**Table 2**

1. Current value of the Drawdown Pension Fund to which this table applies		£	<input type="text"/>
2. How much of this is protected rights?	<input type="checkbox"/> None	<input type="checkbox"/> All	£ <input type="text"/>
3. Is this a dependant's fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If Yes, give			
(a) the date of birth of the original member	Date (DD/MM/YYYY)	<input type="text"/>	
(b) the date of death of the original member	Date (DD/MM/YYYY)	<input type="text"/>	
4. When does the next income year start?	Date (DD/MM/YYYY)	<input type="text"/>	
5. Is the current income year part of a 5-year review period?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If 'Yes', we'll recalculate the maximum income for the start of the next income year.			
If 'No', when is the next review date?			
	Date (DD/MM/YYYY)	<input type="text"/>	
6. What is the current maximum income?	£ <input type="text"/>		
7. How much gross income have you already paid out in this income year?	£ <input type="text"/>		
8. Have you already calculated the maximum income for the next income year?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If 'Yes', what is the maximum income for the next income year?			
	£ <input type="text"/>		
9. What was the value of the Drawdown Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase.)	£ <input type="text"/>		
10. How much of the Lifetime Allowance was used up by:			
(a) the fund designated for income drawdown	<input type="text"/>	.	<input type="text"/> %
(b) the associated tax-free lump sum	<input type="text"/>	.	<input type="text"/> %

Question 8 is relevant if part of this drawdown pension fund has been shared on divorce, or used to buy an annuity, during the income year. It's also relevant if a reduction in the maximum income has been deferred to the start of the next income year.

### Part 4 - Declaration by scheme administrator

I declare that the information in this certificate is correct and complete.

Signature	Date (DD/MM/YYYY)	<input type="text"/>
<input type="text"/>		
Name		
<input type="text"/>		
Position		
<input type="text"/>		