

Self Invested Personal Pension Transfer Certificate

Drawdown to Drawdown Transfer Certificate

SLSIP32A 1121

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.

- Capped and Flexible Drawdown cannot be administered within the same plan, and
- an individual cannot have a member's Drawdown Pension Fund and a beneficiary's Drawdown Pension Fund within the same plan.

Part 1 – Applicant's details

Standard Life Plan Number	D <input type="text"/>	National Insurance Number	<input type="text"/>
Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	<input type="text"/>	Date of birth (DD/MM/YYYY)	<input type="text"/>
Surname	<input type="text"/>		
First name(s) in full	<input type="text"/>		

Part 2 – Transferring scheme

Name of scheme	<input type="text"/>
Scheme administrator	<input type="text"/>
Address of scheme administrator	
Building number	<input type="text"/>
Street	<input type="text"/>
City/Town	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
Telephone number of scheme administrator (include area dialling code)	<input type="text"/>
Email address	<input type="text"/>

Where to go next:**Is the Drawdown Pension Fund (tick one):**

- A member's capped Drawdown Pension Fund If so, go to Part 3
- A member's flexi-access Drawdown Pension Fund If so, go to Part 4
- A dependant's capped Drawdown Pension Fund If so, go to Part 5
- A dependant's flexi-access Drawdown Pension Fund If so, go to Part 6
- A nominee's flexi-access Drawdown Pension Fund If so, go to Part 7
- A successor's flexi-access Drawdown Pension Fund If so, go to Part 8

A 'nominee' is an individual who's not a dependant but who's eligible to receive drawdown on a member's death. They must have been nominated by the deceased member or, in the absence of any surviving dependants or member-nominated beneficiaries, by the scheme administrator.

A 'successor' is an individual who's eligible to receive drawdown on the death of a dependant, nominee or other successor. They must have been nominated by the deceased beneficiary or, if there are no surviving beneficiaries nominated by the deceased beneficiary, by the scheme administrator.

Part 3 – Member’s capped Drawdown Pension Fund

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. When does the next income year start? (DD/MM/YYYY)
3. When is the next review date? (DD/MM/YYYY)
4. What is the current maximum income? £
5. How much gross income have you already paid out in this income year? £
6. 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 6 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.

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’, please photocopy this page, complete a separate table for each part of the Drawdown Pension Fund to which a different review date applies and attach each completed photocopy to this certificate.

If ‘No’, just complete Table 1.

Table 1

1. Current value of the Drawdown Pension Fund to which this table applies £
2. When does the next income year start? (DD/MM/YYYY)
3. When is the next review date? (DD/MM/YYYY)
4. What is the current maximum income? £
5. How much gross income have you already paid out in this income year? £
6. 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? £
7. 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.) £
8. How much of the Lifetime Allowance was used up by:
 - (a) the fund designated for income drawdown %
 - (b) the associated tax-free lump sum %



Question 6 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 – Member’s flexi-access Drawdown Pension Fund

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 £

Section B – Post 5 April 2006 income drawdown

1. Current value of the post 5 April 2006 Drawdown Pension Fund. £

2. What was the value of the post April 2006 Drawdown Pension Fund when drawdown first started? (If drawdown was phased, please total the fund value at the start of each phase). £

3. How much of the lifetime allowance was used up by:

(a) the fund designated for income drawdown %

(b) the associated tax-free lump sum %

Part 5 – Dependant’s capped Drawdown Pension Fund

1. Current value of their Drawdown Pension Fund **£**

2. a) Member’s date of death (DD/MM/YYYY)

b) What was the age at death of the member?

3. If the member died under age 75, is the drawdown income payable to the dependant exempt from income tax under section 579CZA(1) of the Income Tax (Earnings and Pensions) Act 2003? Yes No

If No, is this because:

(a) the dependant received an income payment before 6 April 2015? Yes No

Or

(b) the Drawdown Pension Fund was designated from the member’s uncrystallised funds more than 2 years after notification of the member’s death? Yes No

4. Has the dependant already nominated their successor? Yes No

If Yes, give the name and address of their nominated successor (if there is more than one successor, please provide details on a separate sheet of paper) :

Name

Address

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

6. When is the next review date? (DD/MM/YYYY)

7. What is the current maximum income? **£**

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

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

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

Part 6 – Dependant’s flexi-access Drawdown Income Fund

1. Current value of their Drawdown Pension Fund £

2. a) Member’s date of death (DD/MM/YYYY)

b) What was the age at death of the member?

3. If the member died under age 75, is the drawdown income payable to the dependant exempt from income tax under section 579CZA(1) of the Income Tax (Earnings and Pensions) Act 2003? Yes No

If No, is this because:

(a) the dependant received an income payment before 6 April 2015? Yes No

Or

(b) the Drawdown Pension Fund was designated from the member’s uncrystallised funds more than 2 years after notification of the member’s death? Yes No

4. Has the dependant already nominated their successor? Yes No

If Yes, give the name and address of their nominated successor(if there is more than one successor, please provide details on a separate sheet of paper) :

Name

Address

Part 7 – Nominee’s flexi-access Drawdown Pension Fund

1. Current value of their Drawdown Pension Fund £

2. a) Member’s date of death (DD/MM/YYYY)

 b) What was the age at death of the member?

3. If the member died under age 75, is the drawdown income payable to the nominee exempt from income tax under section 579CZA(1) of the Income Tax (Earnings and Pensions) Act 2003? Yes No

If No, is this because the Drawdown Pension Fund was designated from the member’s uncrystallised funds more than 2 years after notification of the member’s death? Yes No

4. Has the applicant already nominated their successor? Yes No

If Yes, give the name and address of their nominated successor(if there is more than one successor, please provide details on a separate sheet of paper) :

Name

Address

Part 8 – Successor’s flexi-access Drawdown Pension Fund

1. Current value of their Drawdown Pension Fund £

2. a) Date of death of the immediately preceding beneficiary (DD/MM/YYYY)

 b) What was the age at death of the immediately preceding beneficiary?

3. If the preceding beneficiary died under age 75, is the drawdown income payable to the successor exempt from income tax under section 579CZA(2) of the Income Tax (Earnings and Pensions) Act 2003? Yes No

4. Has the applicant already nominated their own successor? Yes No

If Yes, give the name and address of their nominated successor(if there is more than one successor, please provide details on a separate sheet of paper) :


Name

Address

By ‘immediately preceding beneficiary’ we mean the dependant, nominee, or other successor from whom this successor inherited the Drawdown Pension Fund.

Part 9 – Declaration by scheme administrator

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

Signature 

Date
(DD/MM/YYYY)

Name

Position



Signature(s) required

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