**Transferring scheme details**

Zurich Self Invested Personal Pension (Zurich SIPP)
Zurich Protected Rights Transfer Plan

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<table>
<thead>
<tr>
<th>Name of transferring scheme</th>
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<tbody>
<tr>
<td>Pension Scheme Tax Reference number</td>
</tr>
<tr>
<td>Membership/plan/policy number (delete as applicable)</td>
</tr>
<tr>
<td>Name and address of Scheme Administrator/Practitioner/Trustee (delete as applicable)</td>
</tr>
<tr>
<td>Postcode</td>
</tr>
<tr>
<td>Country (if not within the UK)</td>
</tr>
<tr>
<td>Contact’s name</td>
</tr>
<tr>
<td>Contact’s role</td>
</tr>
<tr>
<td>Telephone number</td>
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</table>

**Is any part of the proceeds from this transfer subject to a bankruptcy order?**

- [ ] Yes
- [ ] No

If ‘Yes’ the trustee in bankruptcy should also sign the consent, where applicable.

A copy of a bankruptcy order is required if any part of the proceeds from a transfer are subject to such an order.

**Is the transfer value amount part of a block transfer of all your benefits arising within:**

- [ ] Yes
- [ ] No

a) This scheme (you are transferring from) and/or

b) A previous UK approved, or registered, pension scheme all of whose benefits were subsequently transferred into the scheme (you are transferring from) either before 6 April 2006 or after 5 April 2006 as part of a previous block transfer (or a series of block transfers)?

- [ ] Yes
- [ ] No

**Is your transfer a pension credit?**

- [ ] Yes
- [ ] No

If ‘Yes’, please provide a copy of the pension sharing order.

**Transfer of assets in specie**

If you are transferring assets within the existing scheme rather than encashing them before making the transfer, please tick as appropriate and provide the relevant information:

- [ ] UK commercial property
  - Please complete the separate ‘Property purchase/transfer in application’ form which is available on request. Capita will need to check whether the property or properties can be accepted.

- [ ] Other non-insured assets
  - Please provide a list of assets on a separate sheet. Capita will need to check whether the asset(s) can be accepted before the plan can be set up.
Consent to release information

I apply to transfer my existing pension assets from the pension scheme shown above into my Zurich pension arrangement(s). I consent to the Trustee and Scheme Administrator obtaining details from the provider of the transferring scheme, arrangement or contract of which I am or have been a member. I also authorise the disclosure of information to the Trustee and Scheme Administrator of Zurich’s pension arrangement(s).

Full name

Signature

Date

The Zurich Self Invested Personal Pension and the Zurich Protected Rights Transfer Plan are written under a UK registered pension scheme provided by Zurich Assurance Ltd.
Zurich Pension Trustees Limited is the Trustee of the Scheme.
Capita Life & Pensions Regulated Services Limited is the Scheme Administrator.