

Transfer Enquiry Form

SECTION 1: Your details

Name:

Address (for mailing purposes):

Date of birth:

National Insurance number:

Telephone number (in case we need to call you):

SECTION 2: Details of your existing plan administered by Fidelity

Plan name:

Plan account number:

SECTION 3: Details of the scheme/provider of your other pension benefits

Scheme name:

Scheme address:

Account/Membership or policy number(s):

Please complete a separate transfer enquiry form for each pension provider you are considering transferring benefits from. Please ensure that you sign the declaration to the scheme/provider of your other pension benefits. This declaration can be found overleaf.

SECTION 4: Your declaration

I am considering a transfer of benefits from the plan administered by you to the plan administered by Fidelity. Please take this signed form as my authorisation to you to release any information to Fidelity in order that the transfer can proceed.

Please send me a transfer out pack, including values and any requirements you have of me if I decide to proceed with a transfer. Please also read the enclosed letter from Fidelity and include the details requested in that letter in your reply to me.

At this time I do not wish any payment to be made.

Signature:

Date:

