



# Your Pension Transfer Options

Please read this form carefully and then sign and date the option you would like to choose. You then need to return the form to us. We've enclosed a prepaid envelope for you.

Full name

Grid of 30 empty boxes for full name entry

Plan/Account number

Grid of 10 empty boxes for plan/account number entry

**Option 1 – Transfer to the Fidelity Pension**

I declare that:

- Where I do not understand any or all of the information provided to me relating to the Fidelity Pension, I have sought guidance or suitable advice before proceeding.
- I have read the information provided by Fidelity and Phoenix Life Limited relating to wind-up of the FundsNetwork SIPP and the transfer of my investments to the Fidelity Pension.
- I have read and agree to the terms set out in Doing Business with Fidelity Adviser Solutions, (including the Client Terms), the Privacy Policy including terms related to transfer of investment to Fidelity and such other essential documents as mentioned in the link: [www.fidelity.co.uk/clients/legal-information/](http://www.fidelity.co.uk/clients/legal-information/)
- I have read the Pension illustration.
- I authorise and instruct you to re-register the assets from my FundsNetwork SIPP to the Fidelity Pension. I authorise you to sell and transfer in cash any assets which cannot be re-registered or held in the Fidelity Pension.
- I authorise Phoenix Life Limited to release all necessary information to Fidelity and to transfer my FundsNetwork SIPP to the Fidelity Pension.
- I have read, acknowledge and agree to this Declaration

**Option 2 – Transfer to another providers SIPP/Pension**

If you're selecting this option, you must contact your new provider to start the pension transfer, we cannot do this for you. We cannot commence the transfer of your existing FundsNetwork SIPP until we receive a transfer instruction from your chosen provider. Please note that your chosen provider has up to 90 days from the initial notification of closure to share transfer instructions with us.

If we do not receive a transfer request from them within these 90 days, we'll transfer your FundsNetwork SIPP to the Fidelity Pension and you will be bound by the declaration stated in Option 1 above. You can transfer to another provider at a later date.

Signature

Signature box with a pencil icon

Print name

Print name text box

Date signed

Date signed grid of 8 boxes followed by (DDMMYYYY)

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