



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

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Plan/Account number

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Option 1 – Transfer to the Standard Life Active Money SIPP

I declare that:

- I request Phoenix Life Limited trading as Standard Life to transfer my FundsNetwork SIPP/Fidelity Personal Pension to the Standard Life Self Invested Personal Pension Scheme.
- I agree to be bound by the rules of the Standard Life Self Invested Personal Pension Scheme and the terms and conditions of the Standard Life Active Money SIPP product.
- I declare that the total payments to any registered pension scheme, in respect of which I am entitled to relief under section 188 of the Finance Act 2004, will not exceed the higher of the 'basic amount' or my relevant UK earnings, within the meaning of section 189 of that Act, for that tax year. (The 'basic amount' for the current tax year is £3,600 gross. This may change in future tax years.)
- I declare that I will tell Phoenix Life Limited, trading as Standard Life if an event occurs (such as those listed in my Key Features Document) as a result of which I will no longer be entitled to relief for my payments under section 188 of the Finance Act 2004. I will do so before the end of the tax year in which the event occurs, or within 30 days of the event if this is later.

Option 2 – Transfer to another SIPP

If you're selecting this option, you'll need to contact your new provider to start the pension transfer, we cannot do this for you. We cannot start the transfer of your existing pension until we receive a transfer instruction from your chosen provider.

If we do not receive a transfer request from them within 90 days of the initial notification of closure, we'll transfer your Fidelity Personal Pension/FundsNetwork SIPP to to the Standard Life Active Money SIPP. You can always transfer to another provider at a later date.

Signature

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Print name

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Date signed

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 (DDMMYYYY)

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