

# Pension Transfer Checklist

Simply EQ offers simplified advice on pension transfers, which means we can only advise on transferring certain types of pension.

Please use the checklist below to make sure that your pension is eligible for the Simply EQ service.

## We can advise on transferring:

- ✓ Self-Invested Personal Pension (SIPP)
- ✓ Retirement Annuity Contract (RAC)\*
- ✓ Personal Pension Plan (replaced RAC)
- ✓ Group Personal Pension (GPP)†
- ✓ Stakeholder Personal Pension Scheme†
- ✓ Group SIPP†
- ✓ Small Self-Administered Scheme (SSAS)\*†

\* *Once we have received a Letter of Authority and reviewed your plan details*

† *Provided your employer is no longer contributing*

## We cannot offer advice on:

- ✗ Overseas pensions
- ✗ State pension/Basic state pension/SERPS/S2P
- ✗ Final Salary/Defined Benefit/Career Average
- ✗ National Employment Savings Trust (NEST)
- ✗ With-profits/insurance schemes
- ✗ Partial transfers

## Or if...

- ✗ You have already taken any benefits (we can only advise on transferring pensions that are still in accumulation)
- ✗ Your employer is still making contributions
- ✗ Your pension has any special benefits, enhanced entitlements, or guaranteed benefits
- ✗ Your lifetime allowance is protected or at risk of being breached
- ✗ Your pension holds complex investments such as commercial property

If your pension is not listed here, please call us on **020 7488 7171** to discuss your options.

## Pension plan information

Your pension provider will be able to answer the following questions about your pension plan. We will base our advice regarding the suitability of the Simply EQ service on these answers, and the other details you have given us about your personal circumstances.

### Current plan details

Pension provider
Plan number
Type of pension
Fund value
Transfer value

### Annual charges

Pension charge
Advice charge
Platform charge
Investment management charge
Any other charges

### Pension benefits

Is there any guaranteed annuity rate?	Yes	No
Is the tax free cash more than 25%?	Yes	No
Do you hold any insurance with profits funds?	Yes	No

### Dealing charges

Cost per transaction:
Number of funds held:

Are there any other special benefits, charges or penalties? Please specify:

Please print, sign and return this form to:

**Simply EQ, Centennium House, 100 LowerThames Street, London EC3R 6DL**

Print name:

Signature:

Date:

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