



# Philip J Milton & Company Plc Managed Self-Invested Personal Pension Transfer Form

**Section A - To be completed by the Transferring Member.**

**Personal Information**

Surname	Date of Birth (DDMMYYYY) <table border="1" style="width: 100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>										
Forenames	Marital Status										
Title	National Insurance Number <table border="1" style="width: 100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>										
Existing Account Number if applicable	<table border="1" style="width: 100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>										
Permanent Residential Address	Previous address (if you have moved in the last two years)										

**Transferring Scheme Information**

**Note:** If more than one pension scheme arrangement is being transferred please copy this form and complete for each one.

Full name of the Scheme	
Plan Number	
Pensions Scheme Tax Reference (PSTR) Number (if known)	
Name of Administrator	
Address of Administrator	
Anticipated Amount of Transfer	£
Have you taken benefits from any part of the fund being transferred?	Yes <input type="checkbox"/> No <input type="checkbox"/>



## Disclaimer

You are aware that Gaudi Regulated Services Limited is being asked to transfer benefits from your existing scheme to The Philip J Milton & Company Plc Managed SIPP (a branded variant of the Ashcroft 2 SIPP provided by Gaudi Regulated Services Limited).

Please read the disclaimer below carefully and sign at the foot of the document.

- I have neither sought nor been given any pension transfer advice or information from Gaudi Regulated Services Limited or any of its employees on the subject of pension transfers.
- I have compared the benefits of the Philip J Milton & Company Plc Managed SIPP with those of the pension that I am transferring.
- I can confirm that I am aware that there may be some benefits available within my existing scheme that will not be available via the Philip J Milton & Company Plc. Managed SIPP.
- I understand that if I have taken out protection then paying a contribution or making a partial transfer to the Philip J Milton & Company Plc Managed SIPP could negate this protection.
- I understand that the Philip J Milton & Company Plc. Managed SIPP does not comply with "Stakeholder" criteria which impose certain conditions such as limiting charges to a maximum of 1.5% per annum for the first ten years and 1.0% per annum thereafter.

### To the transferring scheme:

I authorise and instruct you to transfer funds from the plan(s) as listed in this form directly to the receiving scheme as a cash payment or in-specie transfer.

I authorise you to release all necessary information to Gaudi Regulated Services Limited to enable the transfer of funds to the receiving scheme. I agree that a copy of this authority shall have the same validity as the original.

Signed

Date

Client Name (In block letters)

Client Reference Number