



WS Stakeholder Pension Scheme

Transfer Out – Receiving Scheme Declaration Form

As the scheme nominated to receive a transfer from a member of the WS Stakeholder Pension Scheme, please complete the relevant sections of this declaration form and return to Waystone Management (UK) Limited.

1. Customer Details

| | |
|---------------------------|---|
| Customer name | <input type="text"/> |
| Address | <input type="text"/> <input type="text"/> |
| Date of birth | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| National Insurance number | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Plan number | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |

2. Receiving Scheme Details

| | |
|--------------------------|--|
| Full name of scheme | <input type="text"/> |
| Scheme address | <input type="text"/> <input type="text"/> |
| HMRC registration number | <input type="text"/> |

3. Receiving Scheme Bank Details

Name of bank

Address

Postcode

Account name

Bank account number

Bank sort code

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4. Receiving Scheme Undertaking

We undertake that the receiving scheme is:

a) Occupational Scheme

b) Personal Pension/Stakeholder Scheme

c) Self Invested Personal Pension (SIPP)

d) Other (please specify)

5. Declaration by Receiving Scheme

We declare and confirm that:

- a. The receiving scheme is registered with HMRC;
- b. The transfer is a recognised transfer;
- c. We will not take any action or omit to take any action which would result in an unauthorised payment being made;
- d. We will only use the transferred pension benefits to provide pension benefits; and
- e. This declaration is true and correct.

We agree and acknowledge that:

- a. We will not take any action of any kind, and we can have no claim or right of action, against Waystone Management (UK) Limited in connection with the transfer; and
- b. Waystone Management (UK) Limited has no liability (actual or contingent) in respect of the transferred benefits.

Signature

Date

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

Company

Position

Please return this form to:

Waystone Management (UK) Limited
PO Box 5246
Aspect House
63 Spencer Road
Lancing
BN99 9GP