

## WS Stakeholder Pension Scheme

# Transfer out authority and discharge form

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## Important Information

Please complete this form if you wish to transfer your pension savings to an alternative provider. In deciding whether to transfer we strongly recommend you obtain advice from a financial adviser. If you are aged 50 or over, you can also use the Government's free and impartial guidance service, Pension Wise. Visit [www.moneyhelper.org.uk/en/pensions-and-retirement/pension-wise](http://www.moneyhelper.org.uk/en/pensions-and-retirement/pension-wise) or call 0800 011 3797 for more information.

### 1. YOUR DETAILS

Mr/Mrs/Miss/Ms/Other

Surname

Forename(s)

Address

Postcode

Telephone Number

### 2. DETAILS OF WS STAKEHOLDER PLAN TO BE TRANSFERRED

Plan Number

### 3. RECEIVING SCHEME DETAILS

Name of receiving scheme

Address

  

Postcode

Telephone Number

### 4. PENSION WISE GUIDANCE

Pension Wise is a government service that offers free and impartial guidance about your retirement options. The guidance service is available via the internet, over the telephone or face-to-face and will explain what options you have and help you think about how to make the best use of your pension savings. Pension Wise also has an information website.

The Government is concerned that, since it was set up, only a small proportion of individuals accessing their pension pot for the first time have used Pension Wise guidance. The Financial Conduct Authority (FCA) now requires us to check and record whether customers who are aged 50 and over have contacted Pension Wise to make full use of this free service and/or taken financial advice. At the time you come to access your funds, we will ask you to confirm whether you have used Pension Wise and/or taken financial advice.

Our team would be happy to assist in organising an appointment for you. Please get in touch to request this, and we can book a guidance appointment for you at a time and date that suits. Alternatively, should you prefer, you can book an appointment directly by going to [www.moneyhelper.org.uk/pensionwise](http://www.moneyhelper.org.uk/pensionwise) or calling 0800 138 3944. Please note, whether we book your appointment or not, we will still need to confirm and record whether you have used Pension Wise and/or taken financial advice.

I confirm that I have received guidance from Pension Wise.

Yes

If yes, please provide your Pension Wise Reference

You can opt-out of receiving Pension Wise guidance; for example, if you are under age 50, if you are currently receiving advice from an Independent Financial Adviser, or if you have already received Pension Wise guidance within the last 12 months.

If you have chosen to opt out, please complete the section below:

I confirm that I have opted out of receiving guidance from Pension Wise

Yes

Please provide your reason for opting-out

#### 5. AUTHORITY TO PROVIDE RECEIVING SCHEME WITH INFORMATION

I authorise Waystone Management (UK) Limited to release all necessary information to the receiving detailed scheme in section 3 to enable the transfer of funds to the scheme.  Yes

#### 6. AUTHORITY TO TRANSFER FUNDS

I authorise Waystone Management (UK) Limited to transfer the funds from my WS Stakeholder Plan detailed in section 2 to the receiving scheme detailed in section 3 upon receipt of all required documentation.  Yes

#### 7. FUND VALUE

I understand that the fund value transferred to the receiving scheme detailed in section 3 will be determined by the fund prices on the day Waystone Management (UK) Limited receives all the requirements to fulfil my transfer request. This may be less than the fund value stated on the date that this transfer and discharge form was issued to me.  Yes

#### 8. DISCHARGE

I understand that payment made to the receiving scheme detailed in section 3 will represent all of the funds under my plan and that this payment will discharge Waystone Management (UK) Limited of all claims and responsibilities under the WS Stakeholder Pension Scheme.  Yes

#### 9. CUSTOMER SIGNATURE & CONFIRMATION

Print full name (in BLOCK LETTERS)

Position

Signature

Date

I confirm that the information I have given is correct. I understand that once I transfer out of the WS Stakeholder Pension Scheme, my membership of this scheme finishes and I will lose all benefits in this scheme.

#### Confirming your identity

To protect you and us from financial crime, we may need to confirm your identity from time to time. Please refer to the accompanying Verification List which details the forms of documentation we require, and who can certify your documentation. Please send us two forms of documentation, one from List A and one from List B. This documentation must be a certified copy or an original.

#### Once completed, please return to:

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