



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's name

Address

Postcode

Date of birth

D	D	M	M	Y	Y	Y	Y
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National Insurance number

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Plan number

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2. RECEIVING SCHEME DETAILS

Full name of scheme

Scheme manager name and address

Postcode

Email address

Telephone number

QROPS number

3. RECEIVING SCHEME BANK DETAILS

Name of bank

Address

Postcode

Account name

Account number

SWIFT number

IBAN number

4. RECEIVING SCHEME UNDERTAKING

We confirm that the tax laws in the country in which the Receiving Scheme is based allow it to accept a transfer from a pension scheme that is based in the United Kingdom.

We confirm that the Receiving Scheme meets all of the required current legislative requirements to be a QROPS.

We hereby give our authority for HMRC to supply the Trustees of the WS Stakeholder Pension Scheme with information about the Receiving Scheme's status as a QROPS.

Signature

Date

(by, or on behalf of, the Manager of the Receiving Scheme)

5. DECLARATION BY RECEIVING SCHEME

We declare and confirm that:

Where the Receiving Scheme is an occupational pension scheme

Will the transfer value be used to acquire transfer credits (as defined in section 181(1) of the Pension Schemes Act 1993) for the member under the Receiving Scheme?

Yes ☐ No ☐

Is the member employed in an employment to which the scheme relates?

Yes ☐ No ☐

Where the Receiving Scheme is a personal pension scheme

Will the transfer value be used to acquire rights (as defined in section 181(1) of the Pension Schemes Act 1993) for the member under the Receiving Scheme?

Yes ☐ No ☐

Overseas Transfer Charge Information

Please confirm the following:

Is the Receiving Scheme established in the same country in which the member is resident? Yes ☐ No ☐

Is the Receiving Scheme set up by an International Organisation and is the member an employee of the organisation? Yes ☐ No ☐

Is the Receiving Scheme an Overseas Public Service Pension Scheme and is the member an employee of an employer that participates in the scheme? Yes ☐ No ☐

Is the Receiving Scheme an Occupational Pension Scheme and is the member an employee of a sponsoring employer under the scheme? Yes ☐ No ☐

We agree and acknowledge that:

- 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
- 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
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Company

Position

Please return this form to:

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