



Zurich Financial Services UK Pension Scheme (“ZPen”) ZCashBuilder Section (“ZCashBuilder”): Transfer in request and authority form

Notes:

- Before completing this form, you should refer to the transfers section on the ZPen website www.zpen.info
- Please complete the form in BLOCK capitals. If you wish to transfer benefits from more than one scheme, please complete a separate form for each scheme. If you have requested a transfer quote from your previous arrangement, please include the transfer quote with this form.

Your details

Full name (including title):

Address:

Email address:

National Insurance Number:

ZPen Reference Number:

Transferring scheme

Full Scheme Name (“Transferring scheme”):

Scheme administrator:

Policy number/member reference number:

Scheme address:

Contact email address:

Contact telephone number:

Type of scheme, eg Stakeholder, final salary, workplace?

Approximate fund value to be paid to ZCashBuilder:

Is this a full or partial transfer?

Are the benefits being transferred:

- Subject to, or the result of, a pension sharing order or earmarking order?
- Subject to a bankruptcy order?
- Already in drawdown, either partially or fully?

If yes to any of the above please provide details.



Financial adviser details

Company name:

Address:

Contact name:

Contact email address:

Contact telephone number:

Declaration:

I understand and accept that ZCashBuilder does not accept any Guaranteed Minimum Pension (“GMP”) liability or any potential GMP liability, including any such liability arising in future as a result of GMP equalisation. If any of the funds to be transferred originate from a contracted-out salary related arrangement that contained an element of GMP that would be subject to equalisation the transfer cannot be accepted. If the transfer goes ahead and it later becomes clear that the transfer did include GMP related benefits, Zurich Financial Services UK Pension Trustee Limited (the “Trustee”) will not accept any liability arising from GMP or any requirement to equalise GMP. The administrator of the transferring scheme should be able to confirm whether this applies in your case. Please check this **BEFORE** signing this form.

I authorise, instruct and apply to the transferring scheme to transfer assets as listed in the Transferring Scheme section of this form directly to ZCashBuilder and to provide any instructions and/or discharge required by any relevant third party to do so.

I authorise Railpen (administrator for ZCashBuilder), the transferring scheme, any contributing employer and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of assets to ZCashBuilder.

I accept that in order to comply with regulatory obligations, Railpen and the transferring scheme may need to verify my identity and residential address and may use credit reference agency searches and ask for my documents to verify my identity and address.

Until this application is accepted and complete, Railpen’s responsibility is limited to the return of the total payment(s) to the current provider(s).

When payment is made to ZCashBuilder as instructed, this means that I shall no longer be entitled to receive any pension benefits from the transferring scheme where all of my benefits in the transferring scheme are being transferred, or for a partial transfer that I will not receive any benefits from the transferring scheme in relation to the part of the transferring scheme benefits which are transferred.

I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Railpen, the Trustee of ZCashBuilder and the transferring scheme may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this transfer application.



I have read and understood the Transfers page on the ZPen website and understand the risks and possible charges in transferring benefits from the transferring scheme as listed in the Transferring Scheme section.

I understand that neither Railpen nor the Trustee are liable for any costs associated with the transfer. I understand when payment is made to ZCashBuilder, Railpen will invest the transferred amount in line with my current investment strategy (normal contributions), and I understand that I can change my investment strategy online at any time.

I confirm that neither Railpen nor the Trustee have advised me on the suitability of the transfer.

Signature:

Date:

Please return this form to: ZCashBuilder Team, PO Box 377, Darlington, DL3 6XY, or email it to us at zcashbuilderteam@railpen.com.