

Transfer form

This form lets you transfer cash and/or investments from another UK-registered pension scheme into an AJ Bell Junior SIPP.

If you don't already have an AJ Bell Junior SIPP you'll need to apply for one before completing this form. You can apply for a Junior SIPP on our website.

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

When your transfer form is signed and completed, please scan and email it to transfersin@ajbell.co.uk.

Or if you prefer, you can post the completed form to us at:

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

If you email us your transfer form, we may later need you to post us a paper copy with a wet signature. If this is the case – and it'll depend on the provider you're transferring from – we'll be in touch to let you know.

Child's personal details

Title	Surname
<input type="text" value="Master / Miss / Other"/>	<input type="text"/>
Forename(s)	
<input type="text"/>	
Date of birth	AJ Bell Junior SIPP account number
<input type="text"/>	<input type="text"/>
Permanent residential address	
<input type="text"/>	
<input type="text"/>	
Postcode	Country
<input type="text"/>	<input type="text"/>

Please ensure that the child's personal details held with the provider you're transferring from match the above as differing details may delay your transfer.

Your transfer details

Full name of transferring scheme (where known)

Existing plan number or policy number under transferring scheme

Full name of administrator of transferring scheme

Is the transfer cash only? Yes No

Approximate value to be transferred to AJ Bell

This is a full transfer This is a partial transfer

If partial, please confirm the total value of the plan

Making a partial transfer?

You need to complete this section if you want to partially transfer a pension to an AJ Bell Junior SIPP. Please enter the amount of cash you want to transfer below. And, if you intend to transfer assets, in the table beneath it, please enter the investments you want to transfer, along with their approximate cash value. If you don't give us this information, the transfer will be delayed.

You don't need to complete this section if you're transferring a pension in full.

Cash to be transferred

Name of Investment	SEDOL/ISIN	Units

Please continue on a separate sheet if necessary.

IMPORTANT NOTE

You may hold funds with your current provider in a unit class not available with AJ Bell. If so, when you transfer these funds to us, you authorise us to convert them into a mutually held unit class – which could be more expensive. After the transfer is complete, you also give us the authority to convert any of your funds to a cheaper unit class, where one is available.

Request for transfer

I authorise and instruct you to transfer funds from the plan as listed in this form directly to the receiving scheme in the form of

1. A cash payment made by cheque, or such other method agreed with AJ Bell or
2. An in specie transfer of assets held on my behalf (after deduction of any outstanding liabilities or charges). Where appropriate AJ Bell will advise details of the nominee/parties to whom assets must be transferred. I understand that the existing investment manager or administrator of the transferring scheme is responsible for collecting dividends and tax reclaims and realising all rights and entitlements in respect of the assets transferred and for passing them to the receiving scheme.

Where you have asked me to give you any original policy documents in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer listed in this form.

I authorise you to release all necessary information to AJ Bell or AJ Bell Management Limited or Sippdeal Trustees Limited to enable the transfer of funds to the receiving scheme. I agree that a copy of this authority will have the validity of the original.

Until this application is accepted and complete, the receiving scheme administrator's responsibility is limited to the return of the total payments to the current plan.

Where the payment made to the receiving scheme represents all of the funds under the plan listed in this form, then payment made as requested will discharge the current provider of all claims and responsibilities in respect of the plan listed.

Where the payment made to the receiving scheme represents part of the funds under the plan listed in this form, then the current provider will be discharged of all claims and responsibilities only in respect of the part of the plan represented by the payment.

I promise to accept responsibility in respect of any claims, losses and expenses that AJ Bell or AJ Bell Management Limited or Sippdeal Trustees Limited and the current provider may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

I request the scheme administrator of the receiving scheme to accept the transfer from the transferring scheme and to pay it into the SIPP for the child detailed on page one. I confirm that the information provided relevant to this application to transfer benefits into the SIPP for the child detailed on page one is correct and complete to the best of my knowledge and belief.

I accept that in order to comply with regulatory obligations, the receiving scheme and the current scheme named in this application 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.

I confirm that I have not received any advice or recommendation in relation to the transfer from a representative of AJ Bell, AJ Bell Management Limited or Sippdeal Trustees Limited.

Parent's/guardian's name

Date

Parent's/guardian's signature