



Non-Origo Pension transfers – copy of online adviser declaration - client wording

This wording is a copy of the wording that appears in the Aviva Platform online **adviser transfer in declaration**. It covers the client declarations you're affirming on their behalf. This is not a form or a legal agreement – the declaration remains online for you to make on behalf of your client. We've produced this so you can show your client if needed:

- I authorise and instruct you to apply to the current provider to transfer sums and assets from the plan(s) as listed in the contributions and advice charges section of this online application directly to Aviva and to provide any instruction and/or discharge required by any relevant party to do so.
- I authorise Aviva, the current provider(s), any financial intermediary named in this application and any employers paying contributions to the plan(s) as listed in the contribution and advice charges section of this online application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to Aviva.
- Until this application is accepted and complete, Aviva's responsibility is limited to the return of the total payment(s) to the current provider.
- When payment is made to Aviva as instructed, this means that I shall no longer be entitled to receive benefits from the whole of the plan(s) listed in the contributions and advice charges section of this online application where the whole of the plan(s) are transferring, or part of the plan(s) represented by the payments(s) if only part of the plan(s) are transferring.
- I have read any information provided or made available to me by the current provider in connection with this transfer.
- I accept that in order to comply with regulatory obligations, Aviva and the current provider named in this application may need to verify my identify and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.
- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Aviva and the current provider(s) 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 application.

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