

Group Personal Pension Isle of Man

Transfer Form



Company Pension @ Aviva (Isle of Man 89 Plan) Company Pension Freedom @ Aviva (Isle of Man Section 61 Plan) and Personal Pension 98 Series plan (Isle of Man)

When to use this form

This is your application to transfer your pension savings from other approved pension schemes to your Aviva Isle of Man plan. If you want to transfer more than one pension, you'll need to complete a separate form for each one.

Transferring pensions is not right for everyone. It is important to consider the charges, funds and any safeguarded or valuable benefits that could be lost. Your capital is at risk. The value of your pension can go down as well as up and you may get back less than you pay in. There is no guarantee you'll be better off by transferring.

How to fill in this form

Please complete this form in black ink using BLOCK CAPITALS, and return to: **Aviva, PO Box 520, Norwich, NR1 3WG**

It is important you fully complete **ALL** the sections. If any information is missing, it will delay your application.

Your pension transfer language guide

To help you, we've explained the terms you might be unfamiliar with in an online glossary here: www.library.aviva.com/mm30896.pdf

If you have any questions about this application form, please refer to your adviser or call us on **0800 145 5744**.

Section 1 – to be completed by the applicant

Your Aviva pension details

Scheme name	<input type="text"/>
Scheme number	<input type="text"/>
Scheme type/name	Company Pension @ Aviva (Isle of Man 89 Plan) your policy number will start with MX/ Company Pension Freedom @ Aviva (Isle of Man Section 61 Plan) your policy number will start with MF/ Personal Pension 98 Series plan, your policy number will start with MX (delete as appropriate)
Your Aviva pension plan number	<input type="text"/>

Personal details

Full name and title	<input type="text"/>
Your email	<input type="text"/>
Permanent residential address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Postcode
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Status (delete as appropriate)	<input type="text" value="single/married/widowed/separated/divorced/civil partnership/dissolution of civil partnership"/>
National Insurance Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Contact telephone number	<input type="text"/>

Employment status

Which statement describes you best?

Employed Self employed

Section 2 – to be completed by the applicant

About the pension you are transferring to us

To the scheme administrator/trustees of the transferring registered pension scheme from which a transfer payment is to be made:

- I wish to make a transfer payment to the registered pension scheme shown in Section 1 above; and
- I consent to Aviva obtaining details from you in connection with the transfer, and I authorise the giving of such details to Aviva.

Transferring Provider Details

Name of pension scheme/arrangement	<input type="text"/>
Pension scheme plan number (or other identifying reference number)	<input type="text"/>
Name and address of pension scheme provider	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Postcode
Contact number of previous provider	<input type="text"/>
Estimated transfer value amount	<input type="text"/>
Does this represent the total value of the plan?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Where is the transferring pension plan registered (ie UK, Isle of Man, or other).	<input type="text"/>
If the transfer is from a UK scheme and/or to/from and Isle of Man pension freedom Section 61h registered scheme, you may not be able to take benefits before age 55.	
HMRC Pension Scheme Tax Reference number, if applicable	<input type="text"/>

Aviva cannot accept transfers in the following situations:

- unless you have taken regulated financial advice, where you **must** do so to help you make the right decision based on your circumstances. These are when your transfer is from:
 - A defined benefit pension plan (also known as a ‘final salary’ or ‘career average’ pension) with a transfer value of £30,000 or more.
 - A defined contribution pension plan with safeguarded benefits (including guaranteed minimum pension, guaranteed annuity rates and section 9(2b) rights) with a transfer value of £30,000 or more.

Hybrid pensions are a combination of defined benefit and defined contribution. Whether you need to take regulated financial advice will depend on the types of benefits you hold within the hybrid scheme. If the scheme contains any defined benefit assets with a transfer value of £30,000 or more, it's likely you'll have to take advice before your transfer can proceed. The provider of your previous pension scheme should be able to confirm this for you.

- where the transfer is from any type of scheme if you have already taken benefits from your pension funds, such as a tax free cash lump sum or any form of income;
- if there are ongoing legal issues, current disputes or unsettled claims in respect of pension attachment, earmarking or pension sharing orders on a divorce or on a dissolution of a civil partnership;
- any type of scheme which provides any form of guarantee or defined benefit unless you have received regulated financial advice. This restriction may not apply if you have left or are leaving your employer's occupational pension scheme with less than two years' membership, meaning that guaranteed or defined benefits are not retained;

AND where the transfer is into:

Company Pension @ Aviva (Isle of Man 89 Plan) or Personal Pension 98 Series plan

- except for transfers from an Isle of Man to an Isle of Man scheme, any non UK or UK Registered schemes unless you have received regulated financial advice;

Company Pension Freedom @ Aviva (Isle of Man Section 61 Plan) from the following:

- UK Registered schemes;
- Non UK Registered schemes, where a UK transfer has been paid in;
- transfers with any Defined Benefits (Defined benefits schemes may also be known as Final Salary or Career Average Earnings)

If you can't answer any of the following questions about the pension you would like to transfer, please contact your previous provider who will be able to help you. We can't proceed with your transfer if the form is incomplete, so please make sure all the questions have been answered.

Is the transfer from a Qualifying Recognised Overseas Pension Scheme (QROPS)? Yes No

Are there current disputes or unsettled claims in respect of pension attachment, earmarking or pension sharing orders on a divorce or on a dissolution of a civil partnership? Yes No

Does the transfer contain any previous transfers in from UK registered schemes? Yes No

Have already taken benefits from the pension, such as a tax free sum or any form of income, crystallised benefits Yes No

What type of pension is the transfer from? (please tick)

Please select the type of pension plan from the following options:

- | | | | |
|---|--------------------------|--|--------------------------|
| Final salary scheme | <input type="checkbox"/> | Personal pension | <input type="checkbox"/> |
| Salary related scheme | <input type="checkbox"/> | Stakeholder pension | <input type="checkbox"/> |
| Defined Benefit (also known as Final Salary or Career Average Earnings) | <input type="checkbox"/> | Retirement annuity plan/S226 | <input type="checkbox"/> |
| Small self administered scheme (SSAS) | <input type="checkbox"/> | Additional voluntary contribution plan (AVC) | <input type="checkbox"/> |
| Hybrid pension scheme | <input type="checkbox"/> | Free standing additional voluntary contribution scheme (FSAVC) | <input type="checkbox"/> |
| Executive pension scheme | <input type="checkbox"/> | Unregistered/unapproved pension scheme (EFRBS, FURBS, UURBS) | <input type="checkbox"/> |
| Money purchase scheme (COMP/CIMP) | <input type="checkbox"/> | Section 32 | <input type="checkbox"/> |
| Deferred annuity | <input type="checkbox"/> | Isle of Man Pensions Freedom Scheme (S61H) | <input type="checkbox"/> |
| Self invested personal pension (SIPP) | <input type="checkbox"/> | Isle of Man Pension scheme 89 rules | <input type="checkbox"/> |

Does your existing plan contain any of these benefits:

Guaranteed annuity, or annuity rates (GARs)? Yes No

Any other guaranteed benefit that will be lost on transfer? Yes No

Defined Benefit (also known as Final Salary or Career Average Earnings) Yes No

Guaranteed minimum pension or section 9 (2b) rights Yes No

Please note: these benefits will be lost on transfer.

There are other types of safeguarded benefits. Does the pension to be transferred contain any other guaranteed benefit that will be lost when you transfer the pension?

If you have answered "Yes" to any of these benefits, we may not be able to accept the pension transfer.

Do you have less than two years in your current pension scheme, with no guarantees attached and no option to retain any benefits in the scheme? Yes No

If yes, please provide us with a copy of a letter from your current provider confirming the options available to you.

Does the plan you are transferring contain any of the following valuable benefits? Your valuable benefits will be lost transfer.

- Enhanced tax free cash
- Protected retirement age below 50
- Special death benefits, death in service or enhanced death benefits
- Life assurance or integrated life cover
- Waiver of premium protection
- Any other scheme specific benefit or guarantee.

Your valuable benefits will be lost on transfer

If you decide to cancel this transfer, your other provider does not have to accept your transfer back and you will lose your valuable benefit(s).

You may have early exit penalties, or a market value reduction may apply when you transfer from your existing plan.

Section 3 – Financial advice - to be completed by the applicant

Seeking financial advice

We strongly recommend that you seek financial advice if you are thinking about transferring pension benefits. If you do not have a financial adviser, you can find information about financial advisers in your local area by visiting www.unbiased.co.uk. You might be charged a fee by the adviser for their work.

Remember, there are specific situations when you must take regulated financial advice.

Proceeding without financial advice

If you have decided to proceed without taking financial advice it means you are taking responsibility for the suitability of your decision and any future impact on your pension benefits. The decision has been made at your own specific request in consideration of information received or asked for from Aviva, any Aviva representatives or a financial adviser, although none of these parties has provided you with advice. If the pension turns out to be unsuitable, you will have fewer grounds for complaint unless the information you were provided with was incorrect.

Have you spoken to a financial adviser about transferring your pension into this plan?

Have you received regulated financial advice?

Yes No

If you have not received regulated financial advice but your financial adviser is taking responsibility for arranging the transfer, please confirm here:

Yes No

If you have answered 'yes' to either of the above questions, please go to 'About your regulated financial adviser'.

If you have answered 'no' to both of the above questions, please read and complete the 'Non-advised' section below:

Non-Advised

I accept that Aviva strongly recommends that I seek advice before taking any action regarding this transfer of benefits.

I confirm that I do not require any advice in connection with this transfer and that I have not received any such advice, including from Aviva.

Remember, you can't proceed on a non-advised basis if you are required to take regulated financial advice

Your signature

Date

About your regulated financial adviser

Company name of financial adviser

Name of financial adviser

Address of financial adviser

 Postcode

Telephone Number

FCA registration number (FRN)

Email address

Financial adviser declaration**You will need to arrange for your financial adviser to complete this section before returning the form to us.**Have you given full advice to the client in respect of this transfer? Yes No Have you given abridged advice to the client in respect of this transfer? Yes No Is the client deemed an insistent client? Yes No **Remember, we cannot accept a transfer on an insistent client or abridged advice basis.**

If you answered 'no' to all of the above questions, only the final point in the declaration applies.

- I have given advice to the client named in 'Personal details' in relation to the transfer from the scheme named in 'About the pension you are transferring to us' to the plan number listed in 'Your Aviva pension details'.
- I have the appropriate FCA permissions to give advice on pension transfer business and where applicable, on the transfer of safeguarded benefits.
- I accept responsibility in respect of claims, losses and expenses that Aviva 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.

Financial adviser's signature Date **Section 4 – Nomination**

If you die before you have taken all your benefits from this plan, they may be paid to someone else. If you want to nominate a person or persons to receive these benefits, you will need to let us know in writing, or over the phone, although this will not be binding on us. An Expression of Wishes form is available from your adviser or contact us on 0800 145 5744. You can use this form to tell us who you would like us to make lump sum payment(s) to.

A nomination isn't a form of trust. If you want to place your plan under trust, we can send you a specimen trust form. You should discuss this with your legal and/or financial adviser. We recommend that you refer to your adviser if you're unsure, or wish to discuss the implications of making your nomination or placing your plan under trust.

Section 5 – Fund choice - to be completed by the applicant**Please consider your investment choice carefully.**

For details of the investment funds or lifestyling strategies available for your plan and charges that may apply, please refer to the investment guide and/or fund guide available from your adviser or contact us on 0800 145 5744.

Please select one option only**Option 1****Please invest my transfer in the same investment funds/lifestyling strategy as my existing plan.**Your transfer will be applied to the same investment funds or lifestyling strategy, and in the same proportions, as applies to your existing plan at the date your transfer is accepted by Aviva.

or

Option 2**Please invest my transfer in the following investment funds and proportions/lifestyling strategy.**

Fund name	%
Total	100%

Please attach any additional fund selection on a separate sheet. The maximum number of funds you can select is 50.

If your transfer is to an existing plan with lifestyling, and you have selected an alternative fund choice, the current lifestyling will be switched off. This means Aviva will no longer move your investments to different funds as you get closer to your retirement date.**If a fund choice is not selected we will invest the transfer into the existing funds.**

Section 6 – Important information

Financial Crime

To verify your identity and prevent financial crime, your information may be used by any company within the Aviva group and may be shared with third parties who provide services to us, as well as other organisations where required to by law and regulatory requirements.

A record may be kept of any searches carried out and any suspicions of financial crime and related details may be retained and used to assist other companies for verification and identification purposes. The search is not a credit check and your credit rating should not be affected.

Data Privacy

To learn about how Aviva processes personal information, please see our privacy policy at [aviva.co.uk/privacypolicy](https://www.aviva.co.uk/privacypolicy). It's updated from time to time to take account of changes in our business activities, legal requirements and to make sure it's as transparent as possible, so please check back in to see the latest version. A paper copy can be provided on request by writing to Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR.

Section 7 – Declaration - to be completed by the applicant

Please read carefully before signing and dating this declaration.

The Company Pension @ Aviva (Isle of Man 89 Plan) and/or Company Pension Freedom @ Aviva (Isle of Man Section 61 Plan) or Group Personal Pension 98 Series Terms and Conditions and Key Features are important so you should take the time to read them. If you didn't get the documents when you applied, please ask us for a copy. If, after you've read the documents, there's anything you don't understand, you should ask for more information.

I understand that the Company Pension @ Aviva (Isle of Man 89 Plan) and/or Company Pension Freedom @ Aviva (Isle of Man Section 61 Plan) or Group Personal Pension 98 Series Scheme Terms and Conditions will apply to my transfer.

Important: it is a serious offence to make false statements. If you do so you may be prosecuted. The penalties are severe.

- This is my application to transfer into my Aviva pension plan as detailed in Section 1 of this application form. I agree to be bound by the rules of the scheme.
- Where the transfer value is less than £30,000 and I have not chosen to seek any regulated financial advice in relation to the transfer, I acknowledge that Aviva have suggested that I take regulated financial advice; and Aviva have provided me with details of where I may obtain information relating to the transfer.
- I authorise and instruct the transferring provider(s) to transfer funds from the plan(s) listed in this application form, directly to Aviva. Where I have been asked to provide any original plan document(s) 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 the transferring provider(s) may incur as a result of having made the transfer(s).
- I understand that the transfer(s) of benefits will not be accepted if I am already receiving benefits under the transferring arrangement.
- I authorise the transferring provider(s) to release all necessary information to Aviva to enable the transfer of funds to Aviva.
- I authorise Aviva and the transferring provider(s) to obtain from, and release to, the financial adviser named in this application form any additional information that may be required to enable the transfer of funds.
- If an employer is paying contributions to the plan(s) listed in this application form, I authorise the transferring provider(s) to release to that employer any relevant information in connection with the transfer of funds from the plans.
- Where the payment(s) made to Aviva represent(s) all of the funds under the plan(s) listed in this application form, then payment(s) made as requested will discharge the transferring provider(s) of all claims and responsibilities in respect of the plan(s) listed.
- Where the payment(s) made to Aviva represent(s) part of the funds under the plan listed in this application form, then payment made as requested will discharge the transferring provider(s) of all claims and responsibilities only in respect of the part of the plan(s) represented by the payment(s).
- Where the payment(s) made to Aviva represent(s) all or part of funds from a Defined Benefit Scheme I can confirm that (not applicable for transfers into PFS)
 - I wish the transfer to be made
 - I have received a statement from the receiving scheme showing the benefits
 - I accept that the benefits from the receiving scheme may be in a different form and of a different amount to those that would have been paid from the transferring scheme
 - I accept there is no longer a legal requirement for the receiving scheme to provide survivor's benefits after the transfer.

Section 7 – Declaration - to be completed by the applicant *(Continued)*

- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Aviva and the current provider 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. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.
- Until this application is accepted and complete, Aviva’s responsibility is limited to the return of the total payment(s) to the transferring provider(s). In the event of a return of payment to the transferring provider(s), I understand that the funds transferred may reduce in value during the time Aviva holds them, and that the sum repaid may be less than that originally transferred. If the transferring provider(s) will not accept a return of payment, I will provide Aviva with details of an alternative pension plan.

Additional declaration

This section only applies if the transfer payment includes section 9 (2B) rights and/or a guaranteed minimum pension. If you’re unsure, the trustee of the scheme you are transferring from will be able to tell you.

I acknowledge that the transfer payment includes section 9 (2B) rights and/or a guaranteed minimum pension. I confirm that I have received a statement from the receiving scheme showing the benefits to be provided in respect of the transfer payment and I accept that:

- the benefits to be provided will be in a different form and a different amount to those which would have been payable by the transferring scheme; and
- there is no statutory requirement on the receiving scheme to provide for survivor’s benefits out of the transfer value.

To the best of my knowledge and belief, the information on this application, including any additional sections, is correct and complete.

Signature

Print Name

Date

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Section 8 – Additional Transfer Instruction

When to use this Section

Use this page if you are transferring funds from more than one registered pension scheme to your Aviva pension plan number in Section 1. Complete this form with details of your additional transfer and attach it to your application. Copies of this form may be used for multiple transfers.

If copies of this form are taken please attach them to the original application form. They cannot be accepted in isolation.

About the pension you are transferring to us

To the scheme administrator/trustees of the transferring registered pension scheme from which a transfer payment is to be made:

- I wish to make a transfer payment to the registered pension scheme shown in Section 1 above; and
- I consent to Aviva obtaining details from you in connection with the transfer, and I authorise the giving of such details to Aviva.

Transferring Provider Details

Name of pension scheme/arrangement	<input type="text"/>
Pension scheme plan number (or other identifying reference number)	<input type="text"/>
Name and address of pension scheme provider	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Postcode
Contact number of previous provider	<input type="text"/>
Estimated transfer value amount	<input type="text"/>
Does this represent the total value of the plan?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Where is the transferring pension plan registered (ie UK, Isle of Man, or other)?	<input type="text"/>
If the transfer is from a UK scheme and/or to/from and Isle of Man pension freedom Section 61h registered scheme, you may not be able to take benefits before age 55.	
HMRC Pension Scheme Tax Reference number, if applicable	<input type="text"/>

Aviva cannot accept transfers in the following situations:

- unless you have taken regulated financial advice, where you **must** do so to help you make the right decision based on your circumstances. These are when your transfer is from:
 - A defined benefit pension plan (also known as a ‘final salary’ or ‘career average’ pension) with a transfer value of £30,000 or more.
 - A defined contribution pension plan with safeguarded benefits (including guaranteed minimum pension, guaranteed annuity rates and section 9(2b) rights) with a transfer value of £30,000 or more.

Hybrid pensions are a combination of defined benefit and defined contribution. Whether you need to take regulated financial advice will depend on the types of benefits you hold within the hybrid scheme. If the scheme contains any defined benefit assets with a transfer value of £30,000 or more, it's likely you'll have to take advice before your transfer can proceed. The provider of your previous pension scheme should be able to confirm this for you.

- where the transfer is from any type of scheme if you have already taken benefits from your pension funds, such as a tax free cash lump sum or any form of income;
- if there are ongoing legal issues, current disputes or unsettled claims in respect of pension attachment, earmarking or pension sharing orders on a divorce or on a dissolution of a civil partnership;
- any type of scheme which provides any form of guarantee or defined benefit unless you have received regulated financial advice. This restriction may not apply if you have left or are leaving your employer's occupational pension scheme with less than two years' membership, meaning that guaranteed or defined benefits are not retained;

AND where the transfer is into:

Company Pension @ Aviva (Isle of Man 89 Plan) or Personal Pension 98 Series plan

- except for transfers from an Isle of Man to an Isle of Man scheme, any non UK or UK Registered schemes unless you have received regulated financial advice;

Section 8 – Additional Transfer Instruction (Continued)

Company Pension Freedom @ Aviva (Isle of Man Section 61 Plan) from the following:

- UK Registered schemes;
- Non UK Registered schemes, where a UK transfer has been paid in;
- transfers with any Defined Benefits (Defined benefits schemes may also be known as Final Salary or Career Average Earnings)

If you can't answer any of the following questions about the pension you would like to transfer, please contact your previous provider who will be able to help you. We can't proceed with your transfer if the form is incomplete, so please make sure all the questions have been answered.

Is the transfer from a Qualifying Recognised Overseas Pension Scheme (QROPS)? Yes No

Are there current disputes or unsettled claims in respect of pension attachment, earmarking or pension sharing orders on a divorce or on a dissolution of a civil partnership? Yes No

Does the transfer contain any previous transfers in from UK registered schemes? Yes No

Have already taken benefits from the pension, such as a tax free sum or any form of income, crystallised benefits Yes No

What type of pension is the transfer from? (please tick)

Final salary scheme	<input type="checkbox"/>	Personal pension	<input type="checkbox"/>
Salary related scheme	<input type="checkbox"/>	Stakeholder pension	<input type="checkbox"/>
Defined Benefit (also known as Final Salary or Career Average Earnings)	<input type="checkbox"/>	Retirement annuity plan/S226	<input type="checkbox"/>
Small self administered scheme (SSAS)	<input type="checkbox"/>	Additional voluntary contribution plan (AVC)	<input type="checkbox"/>
Hybrid pension scheme	<input type="checkbox"/>	Free standing additional voluntary contribution scheme (FSAVC)	<input type="checkbox"/>
Executive pension scheme	<input type="checkbox"/>	Unregistered/unapproved pension scheme (EFRBS, FURBS, UURBS)	<input type="checkbox"/>
Money purchase scheme (COMP/CIMP)	<input type="checkbox"/>	Section 32	<input type="checkbox"/>
Deferred annuity	<input type="checkbox"/>	Isle of Man Pensions Freedom Scheme (S61H)	<input type="checkbox"/>
Self invested personal pension (SIPP)	<input type="checkbox"/>	Isle of Man Pension scheme 89 rules	<input type="checkbox"/>

2. Does your existing plan contain any of these benefits:

Guaranteed annuity, or annuity rates (GARs)? Yes No

Any other guaranteed benefit that will be lost on transfer? Yes No

Defined Benefit (also known as Final Salary or Career Average Earnings) Yes No

Guaranteed minimum pension or section 9 (2b) rights Yes No

Please note: these benefits will be lost on transfer.

There are other types of safeguarded benefits. Does the pension to be transferred contain any other guaranteed benefit that will be lost when you transfer the pension?

Transfers in from UK registered schemes Yes No

Tax-free cash lump sum taken or crystallised benefits Yes No

Salary related benefits Yes No

Guaranteed minimum pension Yes No

If yes has this benefit been equalised Yes No

Equalisation is where the ceding provider has adjusted this benefit to take into account different retirement ages (Age 65 for men, Age 60 for women)

If you have answered 'Yes' to any of these benefits we may not be able to accept the pension transfer.

Do you have less than 2 years service in your current pension scheme, with no guarantees attached and no option to retain any benefits in the scheme? Yes No

If yes, please provide us with a copy of the letter from your current provider confirming the options available to you.

Section 8 – Additional Transfer Instruction (Continued)

3. Does the plan you are transferring contain any of the following valuable benefits? Your valuable benefits will be lost transfer.

- Enhanced tax free cash
- Protected retirement age below 50
- Special death benefits, death in service or enhanced death benefits
- Life assurance or integrated life cover
- Waiver of premium protection
- Any other scheme specific benefit or guarantee

Your valuable benefits will be lost on transfer

If you decide to cancel this transfer, your other provider does not have to accept your transfer back and you will lose your valuable benefit(s).

You may have early exit penalties, or a market value reduction may apply when you transfer from your existing plan.

Fund choice – to be completed by the applicant

Please consider your investment choice carefully.

For details of the investment funds or lifestyling strategies available for your plan and charges that may apply, please refer to the investment guide and/or fund guide available from your adviser or contact us on 0800 145 5744.

Please select one option only

Option 1

Please invest my transfer in the same investment funds/lifestyling strategy as my existing plan.

Yes No

Your transfer will be applied to the same investment funds or lifestyling strategy, and in the same proportions, as applies to your existing plan at the date your transfer is accepted by Aviva.

or

Option 2

Please invest this transfer in the following investment funds and proportions/lifestyle strategy

Yes No

Fund name	%
Total	100%

Please attach any additional fund selection on a separate sheet. The maximum number of funds you can select is 50.

- **If you do not tick an investment option for this transfer, we will invest your transfer in the investment choice indicated in Section 5 of this form.**
- **If your transfer is to an existing plan with lifestyling, and you have selected an alternative fund choice, the lifestyling will be switched off. This means Aviva will no longer move your investments to different funds as you get closer to your retirement date.**

| Retirement | **Investments** | Insurance | Health |

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