

3. Declaration and consent

In this declaration:

- 'I' or 'my' means the customer named in section 1;
- 'you' means the trustees and/or scheme administrators of the transferring scheme listed in Section 2, and
- 'Aegon' means Scottish Equitable plc as the provider of the Aegon SIPP and scheme administrator of the Aegon Self Invested Personal Pension Scheme ('the Scheme').

Declaration to Aegon

I declare that the information supplied in this form, and any supplementary forms related to it, including transactional data, is true and complete to the best of my knowledge and belief. I am aware that it is a serious offence to knowingly provide false or misleading information on the form.

I consent to the transfer payment from the transferring scheme listed in Section 2 being paid into the Scheme to provide benefits for me.

Declaration to you

I authorise and instruct you to transfer funds from the plan listed in Section 2 directly to Aegon and to provide any instructions and/or discharge required by any relevant third party to do so. Where you've asked me to give you any original policy document(s) in return for the transfer of funds and I'm unable to do so, I promise that I'll be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan.

I authorise you to release all necessary information to Aegon to enable the transfer of funds to Aegon.

I authorise you to obtain from, and release to the intermediary, any additional information that may be required to enable the transfer of funds.

If an employer is paying contributions to the plan listed in section 2, I authorise you to release to that employer, any relevant information in connection with the transfer of funds from the relevant plan.

Until this application is accepted and complete, Aegon's responsibility is limited to the return of the total payment(s) to you.

Where the payment(s) made to Aegon represent(s) all of the funds under the plan listed in section 2, then payment made as instructed will mean that I shall no longer be entitled to receive pension or other benefits from the plan listed in section 2.

Where the payment(s) made to Aegon represent(s) part of the funds under the plan listed in section 2, then payment made as instructed will mean that I shall no longer be entitled to receive pension or other benefits from that part of the plan represented by the payment(s).

Declaration to Aegon and you

I promise to accept responsibility in respect of any claims, losses and expenses that Aegon and you 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 declare that where the source of the transfer is a retirement annuity contract, that contract is not written under trust.

Where there are drawdown to drawdown transfer payments I:

- i. confirm that where the transfer is from a capped drawdown plan, I have requested, in terms of paragraph 8D or 22D of schedule 28 of the Finance Act 2004, that the plan be converted to a flexi-access drawdown plan under the Scheme;

3. Declaration and consent – continued

- ii. confirm that I am aware that if I take income from a flexi-access drawdown plan as a member, this will trigger the money purchase annual allowance where this has not already been triggered;
- iii. confirm that income withdrawals can currently be taken by me as the original member or surviving spouse, civil partner, dependant, nominees or successors from the arrangement(s) of the transferring scheme which are the subject of the transfer payment, and
- iv. agree that no pension commencement lump sum or uncrystallised funds pension lump sum is available from the new arrangements at any time, and no contributions may be paid to the arrangement.

Date

D	D	M	M	2	0	Y	Y
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Print name

Signature

X		X
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