

Defined Benefit Transfer Form

GEN2596 1023

- Please complete and attach to all DB to DC transfer requests.
- This form should be completed in addition to the normal application process.
- A form should be completed for each DB pension transfer.
- Completing this form will ensure we recognise it is a Defined Benefit transfer and can prioritise accordingly to ensure guarantee deadlines are met.
- We will not accept transfer requests where the advice outcome was not to transfer.

Send to:
Standard Life
Standard Life House
30 Lothian Road
Edinburgh
EH1 2DH

Financial adviser details	
Contact name	<input type="text"/>
Contact number	<input type="text"/>
Email	<input type="text"/>
	@ <input type="text"/>
FCA registration number	<input type="text"/>
Standard Life/ Elevate Consultant	<input type="text"/>

DB Scheme	<input type="text"/>
DB Scheme Plan Number	<input type="text"/>
DB Transfer Value	£ <input type="text"/>
DB Transfer Guaranteed Date	<input type="text"/>

Block Transfer (Y/N) Yes No

If a block transfer, please provide details of the other client's name:

Other client's date of birth:

Other client's national insurance number:

Please advise of special instructions e.g. a specific TPA address which differs from the paperwork

Confirmation that client has been set up on WRAP (if applicable) Yes No

Please provide the WP number

Is client moving immediately to drawdown? Yes No

Outcome of Advice

Please confirm the outcome of the advice process by ticking **Yes** or **No** below.

Was the outcome of the advice given supportive of this transfer? Yes No

Please note **we will not** accept transfer requests where the advice outcome was not to transfer.

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