Overseas transfer form

Railwayspensions.co.uk

csu@railpen.com

0800 012 1117

PO Box 300, Darlington, DL3 6YJ

Member name: Member reference:			
Plea		is completed and signed by your new pension provider, using bl	ack
	rtify thatdministered primarily	or wholly outside the UK and:	
		Please tick as app	olicable
1a	Is an Occupational	Pension Scheme	
1b	Is a Personal Pension Scheme (the Scheme is certified as being capable of providing benefits for 'employed earners' in the UK).		
1c	Is a Personal Pens	ion Scheme which is a Self-Employed Pension Arrangement.	
2	The transferee is already in, or intends to take up, employment overseas.		
За	No part of the pension is in payment.		
3b	No loan will be peri	mitted against any part of the transferred funds.	
4	I understand that the Transfer is permanent and that the member has no intention of returning to the UK to work or retire.		
5		full particulars of the Receiving Scheme, (e.g. explanatory a certified copy of the overseas governing documentation tion if necessary).	
6a	the transfer reques the Receiving Sche	the necessary enquiries relevant to the factual circumstances of its in question and taken all steps necessary in order to ensure that eme can validly accept a transfer payment (the 'Transfer Value') in s of the Railways Pension Scheme who have made requests.	
6b	(i) the rules	eme is able to accept the Transfer Value under: s of the Receiving Scheme and slation of the country in which the Receiving Scheme is hed.	
7a		eme is prepared to accept the liability for the Guaranteed Minimum ction 9(2B) rights. (if yes go to 7b)	

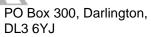
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7b	The member has received a statement from the Receiving Scheme showing the benefits to be awarded in respect of the Transfer Value.	ie
	(Where the Receiving Scheme is prepared to accept the liability for the GMP/S 9(2B) rights, it must be noted that if the GMP/section 9(2B) rights are transferred there is no recourse to the Railways Pension Scheme should the Transfer Value purchase less benefits than would have been the case if the GMP/Section 9(2) rights had been secured in the UK).	ed, ue
7c	The Receiving Scheme is NOT prepared to accept the liability for the GMP/Se 9(2B) rights.	ction
8a	Are there any circumstances under which all or part of the benefit arising from Transfer Value could be forfeited or withheld? (if yes go to 8b and 8c)	the
8b	Please provide details below:	
8c	These details, if any, have been explained to the Member.	
9	I have read the Qualifying Recognised Overseas Pension Scheme (QROPS) guidance issued by HMRC and confirm that the Receiving Scheme is a QROP the purposes of Section 150 (8) and Section 169 of the Finance Act 2004 and am not aware of any circumstances that would lead to such status being withd	that I
	I certify that the above information is accurate and binding.	
Vai		
100	our name:	
Υοι	our name: our position in e company:	
You the	our position in	

Thank you. Please return this form to the address at the top of this page.

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