



About this form

Use this form to give your scheme administrator the information they need to transfer sums or assets held within a registered pension scheme to a Qualifying Recognised Overseas Pension Scheme (QROPS). You must provide this information to your scheme administrator within 60 days of your transfer request. The scheme administrator will need this information before proceeding with your transfer request and HM Revenue and Customs may ask to see this.

Tax charges

There are circumstances in which you may have to pay UK tax on this transfer or later payment out of the overseas scheme even if you are not resident in the UK. Please note if you do not provide this information to your pension scheme administrator within 60 days of your transfer request, your transfer will be subject to the overseas transfer charge. You can find more information about transferring to an overseas pension scheme on gov.uk at www.gov.uk/government/collections/overseas-pension-schemes

About you

<p>1 Your full name</p> <p>Title</p> <input type="text"/>	<p>5 If the address given in question 4 is not in the UK, please give your last principal address in the UK</p> <input type="text"/> <input type="text"/> <input type="text"/> <p>Postcode</p> <input type="text"/> <p>Country</p> <input type="text"/>																
<p>2 National Insurance number</p> <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> <p>If you have contacted Jobcentre Plus and are not entitled to a National Insurance number, please state the reasons and give any HMRC reference number that you have received</p> <input type="text"/> <input type="text"/> <input type="text"/>									<p>6 If your principal residential address is outside the UK, please give the date you left the UK DD MM YYYY</p> <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> <p>If you do not have a previous UK address, please tick this box</p> <input type="checkbox"/>								
<p>3 Your date of birth DD MM YYYY</p> <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>									<p>7 Your contact phone number</p> <input type="text"/>								
<p>4 Your principal residential address</p> <p>This must not be c/o the scheme manager and must not be a PO Box number unless this is necessary due to the country of residence</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <p>Country</p> <input type="text"/>	<p>7A Amount of the available overseas transfer allowance before making this transfer</p> <p>£ <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> . <table border="1"><tr><td></td><td></td></tr></table></p>																

About the QROPS receiving the transfer

8 HMRC reference number This is the QROPS reference number, allocated to the scheme by HMRC, when the notification that it met the requirements to be a recognised overseas pension scheme was acknowledged QROPS <input type="text" value="9"/> <input type="text" value="0"/> <input type="text" value="3"/> <input type="text" value="3"/> <input type="text" value="1"/> <input type="text" value="9"/>	12 Is the QROPS receiving the transfer an occupational pension scheme? No <input checked="" type="checkbox"/> If No, go to question 13 Yes <input type="checkbox"/> If Yes, go to question 15
9 Name of QROPS <input type="text" value="Garrison Bridge Superannuation Scheme"/> <input type="text"/> <input type="text"/>	13 Is the QROPS receiving the transfer an overseas public service scheme? The QROPS you are transferring to will know if they fall within the definition of an overseas public service scheme, as per the definition at regulation 3(1B) SI2006/206 No <input checked="" type="checkbox"/> If No, go to question 14 Yes <input type="checkbox"/> If Yes, go to question 15
10 Address of QROPS <input type="text" value="Lifetime Asset Management Ltd"/> <input type="text" value="P O Box 10760"/> <input type="text" value="Wellington 6140"/> <input type="text"/> Country <input type="text" value="New Zealand"/>	14 Is the QROPS receiving the transfer an international organisation? The QROPS you are transferring to will know if they fall within the definition of an international organisation, as per the definition at regulation 2(5) SI2006/206 No <input checked="" type="checkbox"/> If No, go to question 21 Yes <input type="checkbox"/> If Yes, go to question 15
11 Country in which QROPS is established and regulated <input type="text" value="New Zealand"/>	

Your employment details

15 Name of your employer <input type="text"/>	18 Date your employment began DD MM YYYY <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
16 Your job title <input type="text"/>	19 Do you know your payroll tax reference number? No <input type="checkbox"/> If No, go to question 21 Yes <input type="checkbox"/> If Yes, go to question 20
17 Address of your employer <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/> Country <input type="text"/>	20 Payroll tax reference number <input type="text"/>

Acknowledgement

- 21 Have you been told that you can access some or all of the value of this transfer, either directly or indirectly before you reach the age of 55?

No ☐

Yes ☐

- 22 I am aware that:

In some circumstances a transfer of funds might not be a recognised transfer and may be treated as an unauthorised payment giving rise to a liability to pay tax in the UK ☐

In some circumstances a future payment made or treated as made by a QROPS may be treated as an unauthorised payment giving rise to a liability to pay tax in the UK ☐

I understand that in some circumstances a transfer of funds might give rise to a liability to pay tax in the UK ☐

I undertake to pay tax to HMRC and provide information relating to taxable transfer ☐

To the best of my knowledge and belief the information given in this form is correct and complete.

Signature

Date DD MM YYYY