

Pension credit transfer

– *Collective Retirement Account (CRA)*

With this form you can:

- consent to the payment of a pension credit to an eligible pension scheme, following a Pension Sharing Order.



If the account is currently in 'capped' or 'flexi-access' drawdown, and the account holder is receiving income, we may need to delay the transfer until we've completed the final income payment.



Completing this form

- **Option 1 (electronic):** Save the form to your desktop, open it in **Adobe Acrobat** to complete the editable fields, then print and sign it.
- **Option 2 (by hand):** Print the form and complete it in BLOCK CAPITALS using blue or black ink.
- **Date Format:** please use **DD/MM/YYYY**.
- Missing or unclear information may result in delays. We are unable to correct errors or omissions retrospectively.
- In this document, Receiving Scheme means the eligible pension scheme to which the pension credit will be paid.
- A separate form should be completed for each account held.



Additional documents required

- **From you:** the Pension Sharing Order or Pension Sharing Annex (or order causing the entitlement to a pension credit); and the Final Order/Decree Absolute causing the marriage or civil partnership to be dissolved or annulled.
- **From the Receiving Scheme we will need:** their Pension Scheme Registration document.



Giving us your instruction

- Once section 1 is complete, this form must be signed and sent to the Receiving Scheme.
- The Receiving Scheme should complete section 2 and send the form and any additional documents to:
Quilter, SUNDERLAND, SR43 4JP.

1. Your consent to transfer the pension credit

► **Section 1, A-C, should be completed by the person entitled to the pension credit.**

1A Your details

Full name

Address

Postcode									

Date of birth

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National Insurance number

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1B Account to which the pension sharing order applies

Account number

<i>Customer Reference</i>										<i>Account</i>				
A	C									–				

Account holder's full name

1C Declaration

- I consent to Quilter Life & Pensions Limited paying my entitled pension credit to the eligible pension scheme detailed in section 2.
- I understand that the payment will be made direct to the eligible pension scheme.

Signed

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Date

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Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

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