

Transfer Your Pension

Let us take care of your pension transfers

To help you consolidate your pensions into one location with one view, we've made transferring to True Potential Investor quick and easy with our simple pension transfer form.

Don't worry if you can't find all of the details of your pension, our dedicated team of experts can work with you to find this information. We'll also look after your transfer from start to finish, doing all the work for you.

We're available on 0800 046 8007 from 8am to 8pm weekdays to help with any questions.

Why Transfer?



see your pension plan in one place, with one view



track your pension 24/7



opportunity for greater potential for growth with a combined pension pot

1. Your Personal Details

First Name

Last Name

Date of Birth

 / /

Home Address

Post Code

If you need any help with transferring, would like to transfer part of a pension or are unsure of anything on this form, call our Transfer Team on 0800 046 8007.

2. Pension to Transfer

Pension Provider Name

Policy Number

Estimated Value

Amount to Transfer

Full Amount

Other (Please Specify)

£

3. Declaration

- I have read and accepted the [TPI Pension Key Features and Terms & Conditions](#) and [Pension Transfer Information Sheet](#).
- I authorise True Potential Investments to arrange for the sale of all assets held in my above-named pension and to the transfer of cash proceeds into my pension.
- I have checked if I will lose benefits or guarantees and whether I will incur any penalties and wish to transfer my pension.
- I have not had, or asked for, personal financial advice relating to this transfer. I am responsible for my decision to transfer, If I am unsure whether this transfer is right for me, I will seek advice.

4. To My Current Pension Provider

- I authorise and instruct you to transfer all assets held in my above-named pension directly to True Potential Investments.
- I authorise you to release all necessary information to True Potential Investments to enable the transfer of all assets held in my above-named pension to True Potential Investments.

5. Returning This Transfer Form

Please return this form to:

True Potential Investor, Gateway West, Newburn Riverside, Newcastle Upon Tyne, NE15 8NX

Signature

Print Name

Dated

If you need any help with transferring, would like to transfer part of a pension or are unsure of anything on this form, call our Transfer Team on 0800 046 8007.

Head Office: Gateway West, Newburn Riverside, Newcastle upon Tyne, NE15 8NX

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