

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. Personal details.

| | |
|---------------|--|
| First Name | <input type="text"/> |
| Last Name | <input type="text"/> |
| Date of Birth | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Home Address | <input type="text"/> <input type="text"/> |
| Postcode | <input type="text"/> |

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 and instruct True Potential Investments to request for the sale of assets held in pension(s) listed in this transfer form and to accept the transfer payment 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 funds from the pension(s) listed in this transfer form, directly to True Potential Investments LLP.
- 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

| | | | | | | | | | |
|--|--|---|--|--|---|--|--|--|--|
| | | / | | | / | | | | |
|--|--|---|--|--|---|--|--|--|--|



True Potential Investor is a trading name of True Potential Investments LLP, which is authorised and regulated by the Financial Conduct Authority, FRN 527444. www.fca.org.uk. Registered in England and Wales as a Limited Liability Company No. OC356027.

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

T: 0800 046 8007 E: support@tpinvestor.com W: www.tpinvestor.com

June 2022