

- F. In cases where the Transferee has a choice of an internal or external transfer, if the Transferee has indicated a preference, indicate what this is.
- ☐ Internal transfer ☐ External transfer

**G. In the case of external transfer only
(recommended but optional information)**

(i) The name of the qualifying arrangement which has agreed to accept the pension credit:

(ii) The address of the qualifying arrangement:

(iii) If known, the Transferee's membership or policy number in the qualifying arrangement and reference number of the new provider:

(iv) The name, or title, business address, phone and fax numbers and email address of the person who may be contacted in respect of the discharge of liability for the pension credit on behalf of the Transferee:

(This may be an Independent Financial Advisor, for example, if one is advising the Transferee or the new pension scheme itself.)

(v) Please attach a copy of the letter from the qualifying arrangement indicating its willingness to accept the pension credit

☐

Please complete boxes H to J where applicable

- H. Where the credit is derived from an occupational scheme which is being wound up, has the Transferee indicated whether he wishes to transfer his pension credit rights to a qualifying arrangement? ☐ Yes ☐ No
- I. Where the pension arrangement has requested details of the Transferor's health, has that information been provided? ☐ Yes ☐ No
- J. Where the pension arrangement has requested further information, has that information been provided? ☐ Yes ☐ No

Note: Until the information requested in A, B, (and as far as applicable G, H, I and J) is provided the pension sharing order cannot be implemented although it may be made. Even if all the information requested has been provided, further information may be required before implementation can begin. If so, reasons why implementation cannot begin should be sent by the pension arrangement to the Transferor and Transferee within 21 days of receipt of the pension sharing order and this annex.