



For adviser use only.

- Please complete and attach to all DB to DC transfer requests.
- This form should be completed in addition to the normal application process.
- A form should be completed for each DB pension transfer.
- Completing this form will ensure we recognise it is a Defined Benefit transfer and can prioritise accordingly to ensure guarantee deadlines are met.
- We will not accept transfer requests where the advice outcome was not to transfer.

Send to:

Aberdeen Client Servicing
SUNDERLAND
SR43 4EE

Financial adviser details

Contact name	<input type="text"/>
Contact number	<input type="text"/>
Email	<input type="text"/>
FCA registration number	<input type="text"/>
Consultant name	<input type="text"/>
DB Scheme	<input type="text"/>
DB Scheme Plan Number	<input type="text"/>
DB Transfer Value	£ <input type="text"/>
DB Transfer Guaranteed Date	<input type="text"/>



Financial adviser details - continued

Block Transfer (Y/N) Yes No

If a block transfer, please provide details of the other client below:

Other client's name

Other client's
date of birth
(DD/MM/YYYY)

Other client's
national insurance
number

Please advise of
special instructions

e.g. a specific TPA
address which differs
from the paperwork

Confirmation that
client has been
set up on WRAP
(if applicable)

Yes No

Please provide the
WP number

Is client moving
immediately to
drawdown?

Yes No

Outcome advice

Please confirm the outcome of the advice process by ticking **Yes** or **No** below.

Was the outcome
of the advice
given supportive
of this transfer?

Yes No

Please note **we will not** accept transfer requests where the advice outcome was not to transfer.

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