

Premier SIPP Transfer In Cancellation Notice

IMPORTANT – You should read this carefully

Your right to change your mind

This Notice refers to the Premier SIPP

Date of Issue:

You have recently completed an instruction to transfer benefits into the Premier SIPP (the Plan) from another pension arrangement.

You have 30 days from the day you receive this notice in which to change your mind (the Cancellation Period).

Here are some questions that may help you to decide:

Do I understand what a transfer in means?

- Are you clear on the advice you have received from your adviser?
- You should have received a Key Features document, which should help answer your questions.
- If there is anything that is unclear, or if you have not received a Key Features document, please contact your Financial Adviser, or Options UK Personal Pensions LLP, 2nd Floor, Fitzalan House, Fitzalan Court, Fitzalan Place, Cardiff CF24 0EL, optionspremiersipp@optionspensions.co.uk.
- Pension transfers are a complex area and we strongly recommend that you do receive financial advice. We are unable to accept a transfer in from a final salary related arrangement (also known as a Defined Benefits Scheme) unless you have received such advice.
- There is no extension to the Cancellation Period of 30 days if you ask for further information or if the reply is delayed.

If I do not wish to cancel, what should I do?

- Disregard this notice and do not complete the Transfer In Cancellation Form.

If I wish to cancel, what should I do?

- Send the completed Transfer In Cancellation Form to Options UK Personal Pensions LLP, 2nd Floor, Fitzalan House, Fitzalan Court, Fitzalan Place, Cardiff, CF24 0EL.
- You must post it on or before the 30th day after the date on which you received this notice.
- You will have to contact the administrator of your previous pension arrangement to ask that they accept a return of monies in respect of your transfer.
- If your previous arrangement is not willing to accept a return of monies in respect of your transfer, you will have to notify us of an alternative arrangement that will accept the transfer funds available and provide us with the necessary documentation to enable the transaction to be processed.

Will I lose anything by cancelling?

- Your previous arrangement may not be willing or able to accept a return of monies in respect of your transfer.
- If your previous arrangement is not willing to accept a return of money, you will have to notify us of an alternative arrangement that will accept the transfer funds available.
- Any fees incurred as a result of investigating or arranging your transfer in will remain payable, in accordance with the Plan Terms and Conditions.
- If we receive the Transfer In Cancellation Notice after the transferred funds have been received and invested, in subsequent disinvestments, the amount available may be lower than the original transfer received because of transaction costs or downward movements in prices.
- It may not be possible to promptly disinvest the transferred funds. An example would be property investments.
- You will have incurred fees relating to processing the transfer in and any subsequent investment. These fees will remain payable and will not be refunded to you. In addition, further administrative charges will be applied in relation to disinvestment of monies, and for arranging to transfer these monies away from the Premier SIPP, in accordance with the Premier SIPP Terms and Conditions.

Warning: In the event that you decide to cancel, Options UK Personal Pensions LLP accepts no responsibility for any loss that may arise as a result of your decision.

To: OPTIONS UK PERSONAL PENSIONS LLP
2nd Floor,
Fitzalan House,
Fitzalan Court,
Fitzalan Place,
Cardiff, CF24 0EL

Transfer In Cancellation Form

IMPORTANT: To be returned only if you wish to cancel your instruction to transfer benefits into the Premier SIPP (the Plan) from another pension scheme.

I hereby give notice that I have decided not to proceed with my instruction to transfer benefits into the Premier SIPP.

I confirm that my previous scheme will/will not* accept a return of funds in respect of the transfer.

I enclose details of an alternative arrangement that will accept the transfer funds available.*

I understand that fees remain payable, and additional costs may be incurred as a result of this cancellation.

**delete as appropriate*

Signed:

Date:

Day	Month	Year
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Your Name:

Your Address:

Your Premier SIPP Reference Number:

Name of Scheme/Provider that this Transfer In Cancellation Form applies to:



PART OF



GROUP PLC

FOR MORE INFORMATION PLEASE CONTACT

[OPTIONS UK PERSONAL PENSIONS LLP](mailto:optionspensions@optionspensions.co.uk)

2nd Floor, Fitzalan House,
Fitzalan Court,
Fitzalan Place,
Cardiff, CF24 0EL

optionspensions.co.uk
optionspremiersipp@optionspensions.co.uk