



The Options Workplace Pension Trust

Transfer in Process

If you are considering transferring an existing pension into your Options Workplace Pension, please find details of how to do this below.

Firstly, please contact your existing pension provider and request that they send you their transfer out paperwork.

Please note some providers such as Standard Life do not have specific paperwork for this and you will need to write them a letter to confirm you wish to transfer. If you need any assistance with the wording of this letter please give us a call.

Once you have received your transfer out paperwork from your existing provider, please arrange for any member sections to be completed and then post the form to us at the below address. Again, if you need any assistance with completion of the forms please give us a call and the team will be happy to help.

Options Corporate Pensions UK Ltd
1st Floor, Lakeside House
Shirwell Crescent
Furzton Lake
Milton Keynes
MK4 1GA

We will then liaise with your existing pension provider to get the transfer completed and we will let you know when the monies have come in. Usually the transfer process is straightforward, however some providers do have additional requirements to be met which can delay the process. Where this occurs, we will work with them to complete the transfer as quickly as possible.

Please note if the transfer is coming from an occupational final salary scheme then there are further requirements and you will need to contact us before going ahead.

Our service teams are available to help you at any stage of this process. Please call us on 0330 124 1510.