Aegon Self Invested Personal Pension (Aegon SIPP) transfer out

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please call 0345 604 4001 (call charges will vary) or visit **aegon.co.uk/additionalsupport**

About this form

Please complete this form to transfer to another registered pension scheme from your Aegon Self Invested Personal Pension (Aegon SIPP).

Please complete this form in BLOCK CAPITALS and ball point pen and return it to: Aegon Cofunds Administration, Sunderland SR43 4DN.

Your pension is likely to be one of your most valuable assets. Like anything valuable, your pension can become the target for illegal activities, scams or offers of inappropriate and high risk investments. Find out more about the steps you can take to protect yourself from pension and investment scams and how to avoid them – visit **fca.org.uk/scamsmart** and the **pension-scams.com** websites.

Receiving guidance or advice on transferring to take retirement benefits

If you're transferring in order to take retirement benefits, please tick this box and complete the questions regarding Pension Wise and financial advice below. ☐

If you're not planning to take retirement benefits after transferring, please tick this box and go to Section 1. ☐.

We think you should get financial advice or guidance before making any decisions regarding your pension savings, to help fully understand your options.

Pension Wise guidance

Due to the importance of receiving guidance, the government introduced regulations to highlight Pension Wise. Pension Wise is a free and impartial government service from **moneyhelper.org.uk** offering you guidance on your pension savings and the options available to you. The regulations recommend you take guidance from an independent pension specialist at Pension Wise and appointments are available online, by phone or face to face.

You can book online at **moneyhelper.org.uk/pensionwise** or call them on 0800 138 3944. Alternatively call us on 0345 604 4001 (call charges will vary) and we'll book an appointment for you. Please have your SIPP product number to hand when you call us (if you have one), as we'll ask you for it.

Advice

Before making any decisions about taking your pension benefits you should also get advice from a financial adviser. If you don't have a financial adviser, you can visit **moneyhelper.org.uk/choosing-a-financial-adviser** to find one.

The regulations require you, or your adviser if they're completing the form on your behalf, to confirm the following options before we can proceed with your transaction. If you plan to take guidance and/or advice you should do this before completing this form.

Please make sure you answer the following questions.

1 Have you had advice from a financial adviser relating to this transaction in the last 12 months?

☐ Yes ☐ No

2 Have you received guidance from Pension Wise relating to this transaction in the last 12 months?

☐ Yes **- you don't need to complete question 3**

☐ No **- go to question 3**

3 If you answered **No** in question 2 above and **don't** want to use Pension Wise, you need to opt-out. Please tick the relevant option(s) below.

☐ I don't want to receive guidance.

☐ I don't want to receive advice.

☐ I have already had advice in the last 12 months as confirmed in question 1.

If you've already received guidance or advice, you may want to do this again if there's been any significant change to your pension fund or personal circumstances.

1. Personal details

Customer name

Date of birth

Customer address

Postcode

Phone number

Email address

We'll only use your email address or phone number to contact you about your instruction.

Customer number (if known)

3

Product number (if known)

National Insurance number

2. Aegon SIPP scheme details

Scheme name	Scheme address	Product provider and scheme administrator	HM Revenue & Customs (HMRC) pension scheme tax reference (PSTR)	Trustees
Aegon Self Invested Personal Pension Scheme	Aegon Edinburgh Park Edinburgh EH12 9SE	Scottish Equitable plc	00773956RC	Aegon Pension Trustee Limited

This payment comes from a scheme registered under Chapter 2 of Part 4 of the Finance Act 2004.

3. Transfer details/full transfer/partial transfer

Please contact your adviser to obtain the latest valuation of your pension. This can be taken from the online valuation screen, or by phoning Aegon on 0345 604 4001 (call charges will vary). Please note: this may be higher or lower than the final transfer value, as investment values are likely to change until the transfer is complete.

Please tell us the reason for your transfer:

Please tell us the receiving scheme name

Transfer options

☐ Full transfer

☐ Partial transfer – only available for SIPP

If partial transfer is required, please complete section 4 partial transfer instruction or complete section 5 if a full transfer is to be made.

4. Partial transfer instruction

On what basis would you like your partial transfer to be made:

Amount to transfer to new provider £

☐ Cash transfer

☐ Re-register investments

- Partial transfers of funds in drawdown cannot be made. If a drawdown fund is to be transferred, it must be transferred in full.
- If 'Cash transfer' is selected, your adviser will need to sell units to a sufficient value.
- If 'Re-register investments' is selected, the funds specified in 'Transfer of units' will be transferred without being sold.
- If any fund that forms part of a re-register of investments cannot be accepted by the receiving scheme we will contact you.

Transfer of units

If the value of the funds specified below is insufficient to meet the value specified in 'Amount to transfer to provider' at the point of transfer, we will contact you. If there is insufficient space to list funds, please continue on a separate sheet.

Fund manager, fund name and share class

Please refer to the Aegon SIPP terms and conditions for information on partial transfers **aegon.co.uk/support**.

5. Full transfer instruction

How would you like your full transfer to be made?

☐ Cash transfer

☐ Re-register investments

- If 'Cash transfer' is selected, your adviser will need to sell units to a sufficient value.
- If 'Re-register investments' is selected, the funds specified in 'Transfer of units' will be transferred without being sold.
- If any fund that forms part of a re-register of investments cannot be accepted by the receiving scheme we will contact you.

Transfer of units

If there is insufficient space to list funds, please continue on a separate sheet.

Fund manager, fund name and share class

6. Declaration

Declaration to be signed by the client. I, you and your refers to you, the applicant named in section 1, and Aegon, or we refers to Aegon Pension Trustee Limited as trustees of the Aegon Self Invested Personal Pension Scheme.

- I formally request a transfer to be made from the above pension numbered in section 1 to the receiving scheme set out in section 3.
- I am aware that all of the assets that make up my chosen transfer value will be sold and transferred as cash, except for those funds that cannot be sold or those that I have specifically nominated for a re-register of investments.
- Where I have elected for re-registration of investments, I am aware the investment fund(s) listed in the table at section 4 or 5 will be re-registered from my Aegon SIPP to the receiving scheme named in section 3.
- I acknowledge that any sales that Aegon must complete in order to provide sufficient cash to meet my chosen transfer value must be requested by my adviser.
- I am aware that transferring my funds as part of a re-register of investments may incur CREST transfer or other re-registration fees for each holding, which are payable from my pension.
- I acknowledge that the ability to sell some assets may be limited and as a result the transfer may be delayed.
- I agree the transfer shall be sufficient to end any of my claims to pension benefits from the portion of the plan that is transferred and Aegon will have no further liability or obligation in respect of the transfer.
- I am aware that where I want to transfer out part of my Aegon SIPP product wrapper, the value of what remains, after the transfer must not be less than £1,000. Where the value of my product wrapper remaining would be less than £1,000 Aegon reserve the right to transfer the whole value and close your product wrapper.
- I acknowledge that my transfer will only be completed if my chosen receiving scheme is able and willing to accept the transfer and properly completed this form.
- I declare that to the best of my knowledge and this belief the statements made on this form and its attachments (whether in my handwriting or not) are correct and complete.
- I agree to take responsibility for any losses or expenses that result from any untrue, misleading or inaccurate information that is given by me or on my behalf, on this form, or in respect of the transfer.
- I confirm that I have read the enclosed pension scams leaflet from The Pensions Regulator.

Date

Signature

✗ ✗

Sections 7,8, 9 and 10 should be completed by the receiving scheme provider.

7. Receiving registered pension scheme details

The following information is required before the transfer can be initiated

Registered pension scheme details

Receiving scheme name

HMRC Pension Scheme Tax Reference

Plan/policy number

Receiving scheme type

What is the receiving scheme type?

- ☐ a) Personal or stakeholder pension
- ☐ b) Insured occupational scheme
- ☐ c) Non-insured occupational and other schemes

Name of insurer/life office/ personal pension operator

Address of the trustees/administrator

FCA number (where appropriate)

Postcode

Contact details

Contact name

Receiving scheme address (to which correspondence should be sent to)

Telephone number

Postcode

☐ We have enclosed a copy of the HMRC registration certificate that has been clearly printed from the Pension Schemes Online website or the Managing Pension Schemes service within the last 30 days.

8. Payment details

Payee

Account number

Bank name

Branch sort code

9. Re-register of investments requirements

To be completed if re-register of investments is required, please provide details of the receiving investment manager.

Investment manager/broker name

Telephone number

Investment manager/broker address
(to which correspondence should be sent to)

Reference number

Postcode

10. Declaration for scheme trustees

I/We declare that the receiving scheme is able and willing to accept the transfer payment in cash and/or by re-registration of investments, as set out in this form, and that it will be used to provide appropriate retirement benefits within the receiving scheme named in section 7. I/We confirm that the information given is accurate to the best of my/our knowledge and belief.

I/We declare that the receiving scheme named in section 7 is and will continue to be a registered pension scheme. If it isn't a registered pension scheme at the time of transfer, we will return the transfer.

Date

Company stamp

Print name

Position

Signature

✗ ✗

Aegon is a brand name of both Scottish Equitable plc (No. SC144517) registered in Scotland, registered office: Edinburgh Park, Edinburgh EH12 9SE, and Cofunds Limited, Registered in England and Wales No.03965289, registered office: Level 43, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Cofunds Limited is authorised. © 2026 Aegon UK plc.

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PSAG
Pension Scams Action Group

United action against pension scams

Steps to stay scam safe

Scammers appear professional and it's becoming increasingly hard to spot the difference between something that's legitimate and something that's fraudulent.

The Pension Scams Action Group has put together a checklist to go through if you're ever approached about your pension.

Your pension is your future – keep it safe

The Pensions Regulator | Department for Work & Pensions | FCA Financial Conduct Authority | HM Treasury | Money & Pensions Service | NECC National Economic Crime Centre | PSIG Pension Scams Industry Group

STEP 1

Is the offer unexpected?

Legitimate pension providers are highly unlikely to contact you out of the blue about your pension. Unsolicited pension cold calls are illegal and so are likely to be fraudulent. You should always beware of free pension review offers and/or promises of high or guaranteed returns.

STEP 2

Have you checked who you're dealing with?

Use the Financial Conduct Authority's Firm Checker tool to quickly check that anyone offering you advice or services:

- is authorised by the FCA
- has permission to provide the services you want

This easy-to-use tool is designed to help consumers like you stay safe. In the UK, almost all financial firms must be authorised or registered by the FCA. While it won't remove all risk, using an authorised firm with the correct permissions will greatly reduce your risk of harm.

Tip: A firm pretending to be an authorised firm is known as a 'clone firm' and may have a clone website that looks exactly like the real deal. Always use the legitimate firm contact details provided by the Firm Checker tool and help avoid scams.

Website: **fca.org.uk/firm-checker** Phone: **0800 111 67 68**

STEP 3

Stop and think – are you being rushed or pressured?

Pressure to act quickly or you will miss out is often a warning sign of a scam. If you feel pressured, take your time to make all the checks you need and remember, if it sounds too good to be true, it probably is.

STEP 4

Should you seek impartial advice?

MoneyHelper
Free and impartial information and guidance available online, over the phone and via webchat.

Website: **Moneyhelper.org.uk** Phone: **0800 011 3797**

Financial advisers
If you can, it's a good idea to invest in speaking to a financial adviser. Often large amounts of money are at stake and they will be able to help you make the right decision for you. **Tip:** check any adviser you choose to use is regulated by the FCA.

Stop! Think Fraud
Learn more about how to spot and avoid scams.

Website: **stopthinkfraud.campaign.gov.uk**

If you suspect a scam, report to Report Fraud

Website: **Reportfraud.police.uk/contact-us**
Phone: **0300 123 2040**. In Scotland, call **101**.