ALLTRUST
A UAP Group Company

FAMILY PENSION TRUST

Receiving Scheme Form

May 2026

Important Note

Please complete this form as fully as possible using BLOCK CAPITALS and dark ink. Incomplete forms will cause delays in processing the transfer requested.

Member Details

Member Name	
Member Date of Birth	

Receiving Scheme Details

Plan Reference	
Name of Scheme	
PSTR Number	
Name of Administrator/Operator	
Name(s) of Trustee(s)	
Address for Correspondence	
Postcode	
Contact Name	
Telephone Number	
Email Address	

As the Administrator/Operator of the Scheme (please tick the statement that applies):

We confirm that our Scheme is a registered pension scheme accepted under Chapter 4 of the Finance Act 2004 [1]	☐
A qualifying recognised overseas pension scheme (QROPS) as defined by HMRC under Chapter 4 of the Finance Act 2004 and has satisfied HMRC requirements in this respect [2]	☐

[1] Please provide current HMRC registration confirmation printed from Pension Schemes Online.

[2] Please enclose a copy of the letter from HMRC confirming the recognised status of this QROPS scheme.

Cash Transfer Payment Details

Electronic Payment

Account name

Sort Code

Account Number

Payment Reference

Bank Name and Address

Postcode

In Specie Transfer Details (if applicable)

Has the member applied for an in specie transfer? ☐ Yes ☐ No

If yes, complete the relevant sections of this form to provide the in-specie transfer details. Alltrust Services Limited will ensure that all in-specie assets have been transferred before making any cash payments to the new scheme.

If no, move on to the receiving scheme declaration.

Please provide full details of all assets to be transferred in-specie below, including name of investment and policy/plan numbers where appropriate and contact details. Please see page 4 for further information required if the transfer includes commercial property.

Name of Asset	Details

Investment Manager Accounts

If an investment manager account has been detailed above, please confirm the following:

I/We will be establishing a new account with the same Investment Manager	☐
These investments are to be transferred directly to a new Investment Manager account	☐

Contact details for the transfer:

Name

Company Name

Address

Postcode

Telephone

Email Address

Portfolio Reference

Commercial Property

If a commercial property is to be transferred in-specie, please provide details of the solicitor the receiving scheme will be using to process the transfer.

Contact Name

Company Name

Address

Postcode

Telephone

Email Address

Receiving Scheme Declaration

- We confirm that the sums or assets which are the subject of the transfer are being transferred so as to become held for the purposes of, or to represent rights under, another pension scheme in accordance with section 169 of Finance Act 2004 in order to provide relevant pension benefits.
- We confirm the above statement is true and that upon receipt and acceptance of the transfer value it will be applied to provide benefits for or in respect of the member under the receiving scheme and that the member nor anyone connected with the member will derive no other benefit whether directly or indirectly from the pension fund other than authorised payments, as defined in section 164 of Finance Act 2004, from the receiving scheme.
- We give our permission to HMRC to provide the transferring scheme with information about the registration status of the receiving scheme.
- We understand that in the interest of preventing pension liberation fraud further checks may be made by Alltrust,who may be in contact to request further details of the proposed transfer.

Print Name

Signature

Position

Company

Date Signed

Additional notes and important information

Alltrust requires members to obtain regulated financial advice for certain pension transactions, including but not limited to benefit crystallisation, the transfer of pensions into or out of your Alltrust pension, and the transfer or purchase of non-standard investments, unless the member has been formally assessed and accepted as a Knowledgeable Investor by Alltrust.

Where advice is required, it must be provided by a suitably qualified and regulated financial adviser. That adviser must have a signed agreement with us, except in the case of transfers out, where they must simply hold the appropriate regulatory permissions. This requirement is in place to ensure decisions are made in the best interests of our members and in line with regulatory expectations.

Alltrust reserves the right to decline any instruction that does not meet this requirement.

If you are unsure whether advice is required for your specific request, please contact us before proceeding.

Alltrust Current Terms and Conditions of Business are available to view on our website.

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