

Dealing account



Transfer form for SIPP and SSAS

This form should be used to transfer SIPP or SSAS investments held in a Dealing account with another provider to a Dealing account with AJ Bell. If you want to transfer your pension to an AJ Bell SIPP, please do not use this form.

Please use BLOCK CAPITALS only and blue or black ink.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at help@ajbell.co.uk.

Pension scheme details

Full name of the pension scheme

Pension Scheme Tax Reference (PSTR)

AJ Bell account number

Current provider details

Existing provider account reference number

Approximate value of account to be transferred

Provider's name

Provider's address

Postcode

Country

Please transfer all holdings, including any cash held in the account, to AJ Bell.

Dealing account number with provider

Your name

Date

IMPORTANT NOTE

If your transfer to us includes a fund that isn't a clean fund, we'll convert it to a clean fund equivalent. If there is no clean fund equivalent, we'll hold the fund in its existing form and look to convert it in the future if a clean fund equivalent is created. A clean fund is the same as the original fund, but with commissions for financial advisers, investment platforms and brokers stripped out, meaning you have a better idea of what and who you are paying.

Please sign and date this transfer form and return it to AJ Bell, 4 Exchange Quay, Salford Quays, Manchester M5 3EE.