

# Your Company Pension @ Norwich Union

## Transfer value application

(Internal)



Arranged for

This is the application to transfer pension benefits from your previous with Norwich Union to your new

Please complete the application form in black ink. Full details of your new plan can be found in the Member's brochure.

Please complete all relevant sections in **block capitals** and tick boxes where appropriate.

### 1 Your personal details

Surname

Forename(s)

Date of birth

Male/Female

### 2 Allocation of investment

Unless you state otherwise the transfer payment will be applied to the same investment funds and in the same proportions between these funds as apply to regular premiums at the date the value of your previous policy is transferred to your current policy. If you agree, tick this box.

If lifestyleing applies on your new policy, the transfer payment must be applied to the same investment funds.

If however you wish to alter the funds into which the transferred value is invested please tick this box and attach a completed investment alteration request form to this application.

### 3 Declaration – Current policy details and discharge

#### **Please read the following carefully before signing and dating the application**

It is a serious offence to make false statements and could lead to prosecution.

I request that the total transfer value relating to my benefits held under my previous personal pension policy numbered below should be transferred to my current personal pension policy also numbered below. I understand that the transfer of benefits will discharge Norwich Union of all liability under my previous policy.

Please insert your previous policy no.

Please insert your current policy no.

**I enclose my policy document / I cannot find my policy document** *please delete as appropriate*

I declare that the statements and answers I have given are true and complete to the best of my knowledge and belief.

I understand that where a maximum tax-free lump sum is required to be certified and an appropriate certificate has not been provided to Norwich Union in relation to my previous policy, Norwich Union may be prevented from paying that element of my benefits in the form of a tax-free lump sum at my retirement date.

I understand that the transfer cannot go ahead if any of my benefits under my previous policy have come into payment.

I confirm that my previous personal plan has been freed from any trust.

I agree that my application, if accepted, will be deemed to have a commencement date of the later of the date of receipt of my fully completed application by Norwich Union and the date of payment.

I understand that where protected rights benefits are included, these will be held under a separate arrangement.

I understand that the value will be added proportionately to the relevant existing arrangements.

Signature

Date

NB: If you were contracted out under the transferring arrangement a CA1544(APP3) form may be included. If you have received this form it must be completed and returned with this application. This will allow the transfer of your protected rights from your original policy with Norwich Union to your new policy. In some circumstances we will not need a CA1544(APP3) to transfer the protected rights to your new policy. We will not send you this form unless we need it completed.

If you wished to remain contracted out under your new policy and you have been sent a CA1544(APP3) by us you will also need to complete form CA1542(APP1). You may have already completed this form as part of your main application in which case you need take no further action. If you wish to continue to contract out under your new policy and did not complete form CA1542(APP1) earlier please ask us for a copy.

If you have not been sent CA1544(APP3) you do not need to take any further action if you wish to remain contracted out under your new policy.

A copy of this completed application, the policy terms and conditions and the scheme rules are available on request.

Information you supply may be used for the purposes of administration of the contract by any company within the Aviva Group, by reinsurers, by third parties who provide services to Norwich Union and by your insurance intermediary. Aviva Group may also use information for marketing activities such as market research or contacting you by post, telephone, e-mail, fax or other means regarding your insurance, investment and financial needs.

If you do not wish to receive marketing approaches please write to Norwich Union, FREEPOST, Mailing Exclusion Team, PO Box 903, Sheffield S11 8LE.



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