

50+ Customer Care Call	Verifier Number
Date	
Time	

## Forester Life Personal Pension Plan Supplementary Transfer-In Application

Only to be used in conjunction at the same time as the Transfer-In Application.

### 1. Personal details

Title Mr / Mrs / Miss / Other	<input type="text"/>	National Insurance No. (NI)	<input type="text"/>
Forename(s)	<input type="text"/>	Date of birth	<input type="text"/>
Surname	<input type="text"/>	Email address	<input type="text"/>
Address (permanent residence)	<input type="text"/>	Gender	Male <input type="checkbox"/> Female <input type="checkbox"/>
<input type="text"/>		Telephone number	<input type="text"/>
Postcode	<input type="text"/>		

### 2. Transfer details

Name of Transferring Scheme	<input type="text"/>		
Plan Number(s)	<input type="text"/>	Name of Scheme Trustees or Administrators	<input type="text"/>
Address	<input type="text"/>		
Approximate fund value to be transferred	£ <input type="text"/>	Does this represent the full value of the Plan?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is the transferring Plan subject to any existing or proposed trustee in bankruptcy orders, or earmarking or pension sharing orders, or other receiving orders?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Is this a transfer of a Pension Credit awarded to you from your ex-spouse or former civil partner's pension following a divorce or dissolution of a civil partnership?	Yes <input type="checkbox"/> No <input type="checkbox"/>

### 3. Using your Personal Information

We are committed to ensuring your privacy and personal information is protected. This notice explains the information we may hold, how we obtain it and for what purposes, who we share it with and why, and the rights you have in respect to your information. This is further explained in more detail in our Privacy Policy.

We are Forester Life Limited (Forester Life), a company registered in England under company number 2997655. Our registered office is at Foresters House, 2 Cromwell Avenue, Bromley, BR2 9BF. We are a registered Data Controller and our Data Protection Officer can be contacted by email at [data.protection@foresters.co.uk](mailto:data.protection@foresters.co.uk) or at the above address.

Personal information is information that identifies you, is about you and is provided through your dealings with us. It includes your name, address, contact details, date of birth and Forester Life Plan details. In addition we hold information that we use to manage our relationship with you (contact, complaints and financial information) and information about how you interact with our website. In certain circumstances we may request and receive sensitive personal information about you.

The information you provide to Forester Life will be used for setting up and administering Forester Life Plans, for communicating with and keeping customers informed and for maintaining a record of complaints. In addition it will also be used for research and analysis, for marketing of our products and services and for compliance monitoring and crime prevention.

We share your information with our service providers, identity verification services such as credit reference agencies, and other parts of the Foresters organisation. We will not disclose any of your information to any other body or organisation except to prevent crime or if required by regulations or any law enforcement organisation.

We will retain your information for as long as you are a Forester Life Planholder, and in accordance with our data retention guidelines and legal and regulatory obligations.

Your rights in relation to your information are set out in our Privacy Policy. This is available on our website [foresters.com](http://foresters.com) or by request from Customer Services on 0333 600 0333. The policy provides more detailed information on how to view, correct, withdraw or otherwise change the way we use your personal information.

If we have been unable to satisfy your concerns regarding any aspect of the processing or handling of your information you can contact the Information Commissioners Office on telephone helpline: 0303 123 1113, email visit [www.ico.org.uk/global/contact-us/email/](http://www.ico.org.uk/global/contact-us/email/) or by post at Information Commissioners Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

By submitting the declaration you will be confirming that you have read this notice about using your personal information.

#### Electronic marketing preference

From time to time Foresters Financial will send information about relevant products and services via electronic methods such as email. We will not disclose your details to anyone outside of Foresters Financial for marketing purposes and you may change your marketing preference at any time.

If you prefer NOT to receive marketing via electronic methods please tick the box

**Please turn over >**

#### 4. Declarations and Consent

It is a serious offence to make false statements in an application for membership of the Scheme. The penalties are severe and could lead to prosecution.

##### Declaration by Forester Life Limited:

- Forester Life Limited agrees to administer the Forester Life Personal Pension Plan [as the scheme provider] in accordance with the Scheme Rules.

##### Declaration to the Trustees or Administrators of the Transferring Scheme:

- I authorise, instruct and apply to the Trustees or Administrators of the Transferring Scheme to transfer sums and assets from the Plan(s) as listed in Section 2 of this application directly to Forester Life Limited and to provide any instructions and/or discharge required by any relevant third party to do so.
- I accept that in order to comply with regulatory obligations, Forester Life Limited and the Trustees or Administrators of the Transferring Scheme named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.
- Until this application is accepted and complete, Forester Life Limited's responsibility is limited to the return of the total payment(s) to the Trustees or Administrators of the Transferring Scheme.
- When payment is made to Forester Life Limited as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the Plan(s) listed in Section 2 of this application where the whole of the Plan(s) is transferring, or that part of the Plan(s) represented by the payment(s) if only part of the Plan(s) is transferring.
- I have read any information provided or made available to me by the Trustees or Administrators of the Transferring Scheme in connection with this transfer.

##### Declaration to the Scheme Trustees or Administrators of the Transferring Scheme and to Forester Life Limited:

- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Forester Life Limited and the Trustees or Administrators of the Transferring Scheme may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application.
- I authorise Forester Life Limited, the Trustees or Administrators of the Transferring Scheme and any contributing Employer named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to Forester Life Limited.

##### Declaration to Forester Life Limited:

- I authorise and request Forester Life Limited to accept the above transfer payment from my Transferring Scheme into the Forester Life Personal Pension Plan.
- I consent to Forester Life Limited seeking all necessary information from the Trustees or Administrators of the Transferring Scheme.
- I agree to be bound by the Rules of the Scheme.
- I confirm that I have received the Financial planning service brochure about Forester Life's investment services and a copy of the Key Features of the Forester Life Personal Pension Plan and Personal Pension Transfer Option, which I have read. I am aware that a copy of my application and a specimen Plan Document are available on request.
- I am aware that the transfer will not take place until expiry of the 30 day cancellation period.
- I authorise Forester Life Limited to use my personal information for the purpose set out under 'Using your Personal Information' section.
- I confirm that I have not been provided with any advice by Forester Life Limited to transfer a pension scheme.
- I confirm that to the best of my knowledge and belief all of my answers are true and complete.

Signature of applicant

Date