



PLATFORM

P1 INTUITIVE PENSION ACCOUNT ORIGO REQUEST FORM

Please input any relevant details in the comment box which may assist with the transfer request, such as a previous provider name where companies have merged.

Investor Details

Client Name	<input type="text"/>	DOB	<input type="text"/>
NI Number	<input type="text"/>	P1 Pension ID	<input type="text"/>

Transfer Instruction

Scheme Name	<input type="text"/>	Policy Number	<input type="text"/>
Scheme Administrator (SA)	<input type="text"/>	SA Email	<input type="text"/>
Comments	<input type="text"/>		
Estimated Transfer Value	<input type="text"/>	Full / Partial Transfer?	<input type="text"/>

Financial Adviser Declaration

Through the completion and submission of this form, you are confirming that your client is aware of and agrees to the following:

- I authorise and instruct the above scheme administrator to transfer the sums listed on the application directly to P1 Investment Management Ltd (P1), Gaudi Regulated Services Limited/Gaudi Trustees Limited (Gaudi) and Seccl Custody Ltd (Seccl).
- I authorise P1, Gaudi, Seccl and the current provider named in this application to obtain and release information from each other in order to allow the transfer to proceed.
- I understand that where any benefits being transferred are in Capped Drawdown they will only be accepted on the basis that they will be immediately converted to Flexi-Access Drawdown. I also understand that if I draw any income via Flexi-Access Drawdown I will become subject to the Money Purchase Annual Allowance, if I am not already subject to it. I hereby instruct that any Capped Drawdown benefits are converted to Flexi-Access Drawdown upon receipt.
- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or penalties that P1, Gaudi, Seccl and the current provider may incur as a result of incorrect, untrue or misleading information being given in this application.
- I understand the risks associated to the transfer and accept that in order to comply with regulatory obligations P1, Gaudi, Seccl and the current provider named may need to verify my ID and residential address, and may use credit reference services and ask for documents to verify my ID and address.
- I understand that until this application has been completed and is accepted, the responsibilities of P1, Gaudi and Seccl are limited to returning any funds received direct to the ceding provider.
- I understand that when funds are being transferred, whether a full transfer or partial transfer, I am not entitled to receive pension benefits from these transferred funds until the transfer has fully completed.
- I can confirm that I have received and understand the financial advice in relation to this request and the details of my financial adviser are shown below.

I can confirm that the information provided on this form is correct.

Firm Name	<input type="text"/>
Adviser Name	<input type="text"/>

Please email the completed form to platform@p1-im.co.uk.