

**Using the editable fields?**

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

## Pension credit transfer

– *Collective Retirement Account (CRA)*

### With this form you can:

- consent to the payment of a pension credit to an eligible pension scheme following a Pension Sharing Order.

**Note** – If the account is currently in 'capped' or 'flexi-access' drawdown, and the account holder is receiving income, we may need to delay the transfer until we've completed the final income payment.

### Completing this form

- Complete this form, as applicable, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- Missing or unclear information may result in delays. We are unable to correct errors or omissions retrospectively.
- For the purpose of this document, Receiving Scheme means the eligible pension scheme to which the pension credit will be paid.
- A separate form should be completed for each account held.

### Additional documents required

From you:

- the Pension Sharing Order or Pension Sharing Annex (or order causing the entitlement to a pension credit); and
- the Final Order/Decree Absolute causing the marriage or civil partnership to be dissolved or annulled.

From the Receiving Scheme we will need:

- their Pension Scheme Registration document.

### Giving us your instruction

- Once section 1 is complete, this form must be signed and sent to the Receiving Scheme.
- The Receiving Scheme should complete section 2 and send the form and any additional documents to the following address:  
**Quilter, SUNDERLAND, SR43 4JP.**

## 1. Your consent to transfer the pension credit

► **Section 1, A-C, should be completed by the person entitled to the pension credit.**

### 1A Your details

Full name

Address

	Postcode

Date of birth

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National Insurance number

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### 1B Account details

Please provide details of the account to which the pension sharing order applies.

Account number

Customer Reference		Account
A	C	

Account holder's full name

### 1C Declaration

- I consent to Quilter Life & Pensions Limited paying the pension credit (to which I am entitled) to the eligible pension scheme detailed in section 2.
- I understand that the payment will be made direct to the eligible pension scheme.

Signed

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Date

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*Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.*

*Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).*

*Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.*

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