



## Defined benefit transfer request

### 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.

Client name

Application number

CETV guaranteed deadline date  
*(must be completed)*

To support your transfer application, please ensure that all relevant documentation is enclosed.

[platform.quilter.com](https://platform.quilter.com)

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 Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Life & Pensions Limited is registered in England and Wales under number 4163431.

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**For financial advisers only**

