

Public Sector Pensions Authority

PSPA2 Transfer in Investigation Request Form

If you wish for the PSPA to investigate the possibility of transferring benefits into the Scheme, please complete this form and return it to our office. Please note that a Transfer Request can only be made once per previous arrangement.

Please complete in black ink using BLOCK CAPITALS.

Part 1 – About Yourself

Your PSPA reference number	
Name of Pension Scheme (the Scheme)	

Full Name	Address
<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>
<input type="text"/>	<input type="text"/>
National Insurance Number	<input type="text"/>
<input type="text"/>	<input type="text"/>

Email Address

Part 2 – Previous Pension Arrangement

Name of Arrangement	<input type="text"/>
Policy Reference	<input type="text"/>
Name of Administrator	<input type="text"/>
Policy Start Date	<input type="text"/>
Policy End Date	<input type="text"/>
Approximate Value (£)	<input type="text"/>
Administrator Address	<input type="text"/>

If you wish to investigate multiple transfers, please provide details on an **additional application sheet**.

Part 3 – Your Declaration

By signing and returning this form to the PSPA I hereby authorized the disclosure of information between the PSPA and my previous provider, as listed above.

Signature

Date

When completed, please return the application form to:

Public Sector Pensions Authority, 3rd Floor Prospect House, 27-29 Prospect Hill, Douglas, Isle of Man, IM1 1ET

How we use your information: The PSPA will use the information that you have provided on this form for administering your Scheme membership and processing payment of your pension benefits. We may share your information to administer and pay your pension, enable us to prevent and detect fraud and mistakes, or as required by law. For more information about whom we share your information with and how long we keep your personal data and your rights, please refer to our Privacy Notice on our website at www.pspa.im

Application for a Transfer In Investigation – Guidance Notes for Applicants

Part 1 – About Yourself

Please enter your PSPA reference number and name of pension scheme. These are usually stated on any correspondence received from us. Please enter your contact details and national insurance number.

Part 2 – Previous Pension Arrangement

Please fully complete this section in any and all cases.

Please ensure you enter your approximate pension fund value. Any funds with a value of under £10,000 cannot be transferred in if being transferred into GUS. If you are unsure of this, please check with your previous pension provider.

Part 3 – Declaration

You must read the declaration before you sign and date the form. We recommend you seek financial advice when transferring any pension arrangements to another provider.

Where can I find more information? You can find more information using the resources on our website at www.pspa.im