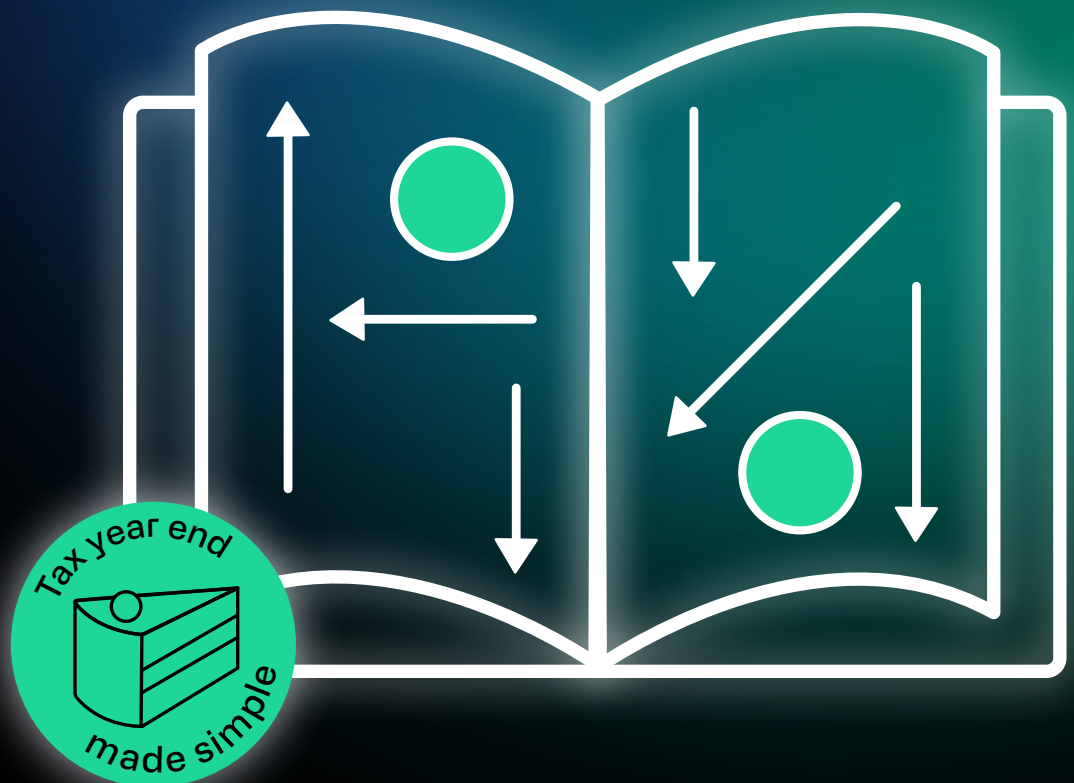


How to complete a GIA to SIPP transfer (Bed and SIPP)

For adviser use only





How to complete a GIA to SIPP transfer (Bed and SIPP)

1. From the Adviser Zone homepage, search for the investor using their name, investor number, or wrapper ID and press 'view.'
2. Select the investor's uncrystallised SIPP, and then press 'top-up.'
3. Next, review the pension details if needed and answer the question highlighted below:

1
Nickname (Optional)

2
Pension Details

Employment status : Employed
Flexibly Accessed : No
Preferred retirement age : 65

3
Investment Types

No investments

Pension Details

Employed

Has your client 'flexibly' accessed any of their pension rights?

Yes No

Preferred retirement age?
65

Do you wish to fully crystallise the investments being made into this pension?

Yes No

Please select whether you want investments into this pension to be crystallised.

BACK SAVE NEXT

4. Under investment types, select single contribution.
5. Select 'investor' from the investment types.
6. Enter the investment amount. This will show the tax relief available.
7. Select an adviser initial charge if applicable.
8. Select the investment source from the drop-down menu. For a GIA to SIPP transfer, select 'other', then enter GIA into the text field. You'll then need to enter the investor's salary and occupation.
9. Click next, to be taken to the ongoing charges page.
10. Now you can select how the funds should be invested, either your default investment strategy or select a different one.
11. Next, download and review the documents and submit.
12. Complete the declaration page and select 'proceed' to complete the transfer.
13. Please send a Secure Email requesting that '£x amount is moved from wrapper XXXXX to wrapper YYYYYY and invested as per the instructions in the Top Up.'

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If you require this document in an alternative format please contact us.

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