

DEFINED BENEFIT PENSION TRANSFER QUESTIONNAIRE

1. Please provide the number of Pension Transfers from **Defined Benefit Occupation Pension Schemes** that the insured entities have arranged prior to 1st April 2019.

Number of transfers	Average Transfer Value	Largest Transfer Value

2. If the insured entities wish to continue providing advice regarding the transfer of benefits form Defined Benefit Pension Scheme after 1st April 2019, please provide the number of anticipated transfers in the next 12 months

Number of transfers	
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Firm

Signature of Director/Partner/Principal

Name

Date