



The Company

Move My Pension Limited was founded to provide professional UK Pension advice and transfer services to immigrants and New Zealand residents with UK Pensions. Move My Pension Ltd has offices in Hamilton and Christchurch and provides New Zealand wide service via personal visits and by phone contact. The Financial Advisors have many years experience transferring UK Pensions and have worked in Financial Services in the UK and New Zealand. They are members of the Institute of Financial Advisors and are bound by the high ethics, standards and disciplinary process detailed in the IFA Practice Standards.

The pension transfer service described in this brochure uses HMRC approved GROPS (Qualifying Recognised Overseas Pension Schemes) who are some of New Zealand's most respected and stable Fund Managers and Insurance companies.

Move My Pension UK Pension Transfer Information – The Benefits

When planning your retirement in New Zealand you need to consider the benefits of transferring your pensions from the United Kingdom to New Zealand.

The Benefits Include:

- Being able to consolidate all your pensions with a single provider in your new country
- Being able to access financial advice across your whole portfolio of assets in New Zealand
- Reducing currency risk
- More flexible options as far as how you take your pensions at retirement in New Zealand
- Reduce risk of your UK Pension being lost or underfunded or wound up in the UK
- More control as to what you have at retirement by being able to invest to suit your needs
- Your Pension assets become yours to own and control
- Reducing your tax liabilities in NZ

UK Pension Transfer Process

- 1) Complete a transfer Data Collection Form.
- 2) Your Pension company is approached to provide a Transfer Value and Statement of Benefits.
- 3) Move My Pension will then explain your options and fees to transfer the Pension to allow you to make an informed decision.
- 4) The Transfer documents and New Zealand Superannuation scheme's application form are completed and sent to the UK Pension scheme requesting a Transfer.
- 5) When all the requirements are met, your Pension is sent directly to the New Zealand Scheme to be invested as you have requested.
- 6) Transferring Pensions can take up to 6 months to complete depending upon the UK Pension schemes requirements.
- 7) Move My Pension – can assist you further with Ongoing Monitoring of your Pensions and Retirement advice if required.

Please complete the following form to proceed.

UK Pension Transfer Data Collection Form & Authority to Act

Name: Spouse's name:

Date of birth: / /

Address:

Tel: Fax:

Email:

UK Employer (or Scheme) Name & Address: (If possible attach a copy statement)

Period of service: National Insurance Number:

UK Fund Manager: (If possible attach a copy statement)

Policy Number:

Date of New Zealand residency: / /

To Whom it may concern

Please accept this letter as my authority for you to release information concerning my pension entitlement to Move My Pension Ltd.

Signed:

Date:

