



# Transfer in – request forms and quotation

Complete this form to request more information on transferring a pension to the defined contribution (DC) part of USS, the Investment Builder.

Return this form to: Transfer Team, Universities Superannuation Scheme Limited, Royal Liver Building, Liverpool, L3 1PY

Or log in to My USS and upload the completed form to the [Make an enquiry](#) page.

Please complete this form using BLOCK CAPITALS

### Member details

Title \_\_\_\_\_ Surname \_\_\_\_\_

First names \_\_\_\_\_

Date of Birth \_\_\_\_\_

National Insurance number \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_ Postcode \_\_\_\_\_

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### Employer details

Full name of employer \_\_\_\_\_

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### Details of pension scheme/schemes you are interested in transferring from

Previous employer's name (if applicable) \_\_\_\_\_ Scheme name \_\_\_\_\_

Dates of service \_\_\_\_\_ Reference number \_\_\_\_\_

Surname known by in this scheme \_\_\_\_\_

Scheme address \_\_\_\_\_

If you are interested in transferring a second arrangement to USS, please complete the fields below:

Previous employer's name (if applicable) \_\_\_\_\_ Scheme name \_\_\_\_\_

Dates of service \_\_\_\_\_ Reference number \_\_\_\_\_

Surname known by in this scheme \_\_\_\_\_

Scheme address \_\_\_\_\_

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### My USS

As part of the process of transferring benefits from a former scheme to USS, you have the option to make

investment choices for your transfer through My USS. We will provide more details of this in the ‘transfer in pack’ we’ll send you or read more on the [Investment Builder](#) page.

To register for My USS visit [uss.co.uk/register](http://uss.co.uk/register).

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### Checklist

- I have read the important information on transferring benefits on the [transfers in](#) page of [uss.co.uk](http://uss.co.uk)
  - I have completed the previous scheme details correctly on this form, for all schemes that I am interested in transferring from.
  - I confirm I am currently an active member of USS, and I understand that should I leave USS during the transfer in process and have not yet accepted a transfer in offer, the transfer in will be cancelled. If the transfer payment is received it will be returned to the transferring provider.
  - Where possible, I have enclosed a transfer value statement and any discharge papers from my previous pension. If you don’t have this, we will contact your previous scheme/schemes for a transfer value anyway.
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### Declaration by member

To Universities Superannuation Scheme Limited (the trustee company); I hereby give authority to the trustee company to obtain any information it requires in connection with my pension benefits from the administrators or trustees of any pension scheme of which I am or have been a member. I understand that whilst the trustee company will investigate the potential transfer(s) of benefits from my former scheme(s) to USS and keep me informed of any typically on a monthly basis, I understand, if I choose to proceed, it is ultimately my responsibility to ensure the transfer is completed.

I understand I can withdraw my consent at any time by contacting either scheme, and the transfer in process will be ceased as soon as is reasonably practicable.

Name \_\_\_\_\_

Member’s signature \_\_\_\_\_ Date \_\_\_\_\_

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### What happens next?

Once you’ve sent this form you will receive a ‘transfer in pack’, usually within eight weeks. This pack will have all the information and forms you need to complete the transfer to USS. For more details on the transfer process and how long it takes visit our [transfers in](#) page at [uss.co.uk](http://uss.co.uk).

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### Data protection

Universities Superannuation Scheme Limited takes its obligations under the General Data Protection Regulation (GDPR) seriously and has appropriate procedures in place to ensure your personal data and rights are protected.

The information provided on this form will be used for the purpose of administering your pension. Where necessary we may disclose your information to your employer, our appointed third parties and the administrators of the scheme(s) you have identified. By completing this form, you provide your consent for us

to contact the administrators of the scheme(s) you have identified on this form. You can withdraw your consent at any time and the transfer in process will be stopped.

Find out more about how we collect and process your personal data, protect your privacy, and how you can contact our data protection officer, by visiting [uss.co.uk/privacy-notice](https://uss.co.uk/privacy-notice).

For a glossary of our terms please see more information on our [important information](#) page.