

Transfer in request form

Please return this form to:

Transfer Team

Universities Superannuation Scheme Limited,

Royal Liver Building, Liverpool, L3 1PY

Please complete this form using BLOCK CAPITALS

Member details

Title _____ Surname _____

First names _____

National Insurance number _____

Address (members must complete this section using home address details) _____

_____ Postcode _____

Institution details

Full name of employing institution _____

Scheme details

Employer's name _____ Scheme name _____

Dates of service _____ Reference number _____

Surname known by in this scheme _____

Scheme address _____

If you would like to transfer a second arrangement to USS, please complete the fields below:

Employer's name _____ Scheme name _____

Dates of service _____ Reference number _____

Surname known by in this scheme _____

Scheme address _____

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

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

My USS

As part of the process of transferring benefits from a former scheme to USS, you may be required to make investment choices for your transfer through My USS, the online service for managing your USS membership. My USS is where you can go to learn about your investment fund options and make your investment choices for the Investment Builder, add and manage additional contributions and change your details including your Target Retirement Age. You need to register for My USS using your member number. If you're having trouble finding your USS member number, [contact us](#), or call our Member Service Team on 0333 300 1043. You can access My USS from uss.co.uk.

Checklist

- I have read the important information on transferring benefits on the USS website.
 - I have completed the previous scheme details correctly on this form, for all schemes that I am transferring from.
 - Where possible, I have obtained a transfer value statement from my previous scheme and enclose it with this form.
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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 progress via my employer (typically on a monthly basis), I understand that 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 reasonably practicable (if you notify the transferring scheme the process will be ceased as soon as reasonably practicable after we have received notification from them that your consent has been withdrawn).

Name: _____ Position: _____

Member's signature: _____ Date: _____

USS recommends that you contact your former scheme and USS to pursue the transfer should you feel that it is not progressing in a timely manner. USS will write to you once the transfer is complete. Until this confirmation has been received you should not assume the transfer had been completed, even if you have accepted a transfer offer.