

SWITCHING

YOUR **SIPP** PROVIDER TO WALKER CRIPS PENSIONS

Switching SIPP provider has been made very simple

FINANCIAL ADVISER

Send **your** client's signed and completed application form and discharge forms (from the transferring provider), together with verification of your client's identity to Walker Crips Pensions.

YOUR CLIENT

Complete and sign the documents in the Walker Crips SIPP welcome pack.

WALKER CRIPS PENSIONS

We do the rest!

Including, liaising with the ceding scheme, arranging for any additional forms to be signed, overseeing the transfer, either as cash or in-specie, chasing the progress and keeping you and your client notified throughout.

Please note: The transfer/discharge forms will not be submitted until the cooling off notice has expired, unless the client waives the right to the cancellation notice.

This document is for professional advisers only and should be read in conjunction with the fee schedule and Walker Crips Pension Range. Any pensions switch should be fully justified and supported by a suitability rationale – if, as the adviser, you have any questions regarding our product range, please contact us.

The Walker Crips SIPP is operated by Ebor Trustees Limited who are authorised and regulated by the Financial Services Authority. Walker Crips Pensions is the trading name of Ebor Trustees Limited, who is the trustee and operator of the Walker Crips SIPP. Ebor Trustees Limited are also trustees to SSAS arrangements administered by Walker Crips Pensions.

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