

Qualifying Recognised Overseas Pension Schemes – Member information for pension scheme administrators

About this form

Use this form to give your scheme administrator the information they need to transfer sums or assets held within a registered pension scheme to a Qualifying Recognised Overseas Pension Scheme (QROPS). You must provide this information to your scheme administrator within 60 days of your transfer request. The scheme administrator will need this information before proceeding with your transfer request and HM Revenue & Customs may ask to see this.

Tax charges

There are circumstances in which you may have to pay UK tax on this transfer or later payment out of the overseas scheme even if you are not resident in the UK. Please note if you don't provide this information to your pension scheme administrator within 60 days of your transfer request, your transfer will be subject to the overseas transfer charge. You can find more information about transferring to an overseas pension scheme on gov.uk at www.gov.uk/government/collections/overseas-pension-schemes

About you

1	Your full name Title	If the address given in the previous question is not in the UK, please give your last principal address in the UK
	Last name	
	First name(s)	Postcode Country
2	National Insurance number If you have contacted Jobcentre Plus and are not entitled to a National Insurance number, please state the reasons and give any HMRC reference number that you have received	If your principal residential address is outside the UK, please give the date you left the UK DD MM YYYY If you don't have a previous UK address, please tick this box Your contact phone number
3	Your date of birth DD MM YYYY	
4	Your principal residential address This must not be c/o the scheme manager and must not be a PO Box number unless this is necessary due to the country of residence	
	Country	

About the QROPS receiving the transfer

9	HMRC reference number This is the QROPS reference number, allocated to the scheme by HMRC, when the notification that it met the requirements to be a recognised overseas pension scheme was acknowledged QROPS Name of QROPS Address of QROPS	Is the QROPS receiving the transfer an occupational pension scheme? No
11	Country Country in which QROPS is established and regulated	organisation? The QROPS you are transferring to will know if they fall within the definition of an international organisation, as per the definition at regulation 2(5) SI2006/206 No
You	ır employment details	
15	Name of your employer	18 Date your employment began DD MM YYYY
16	Your job title	Do you know your payroll tax reference number? No If No, please go to question 21
17	Address of your employer	Yes If Yes, please go to question 20 Payroll tax reference number
	Postcode Country	

Acknowledgement 21 Have you been told that you can access some or all of To the best of my knowledge and belief the the value of this transfer, either directly or indirectly information given in this form is correct and complete. before you reach the age of 55? Signature No Yes 22 I am aware that: Date DD MM YYYY In some circumstances a transfer of funds might not be a recognised transfer and may be treated as an unauthorised payment giving rise to a liability to pay tax in the UK In some circumstances a future payment made or treated as made by a QROPS may be treated as an unauthorised payment giving rise to a liability to pay tax in the UK

I understand that in some circumstances a transfer of funds might give rise to a liability to

I undertake to pay tax to HMRC and provide information relating to taxable transfers

pay tax in the UK