

**MY REASONS FOR CONSIDERING A TRANSFER OF MY UK DEFINED BENEFIT
(‘SAFEGUARDED BENEFITS’) PENSION SCHEME TO A DEFINED CONTRIBUTION /MONEY
PURCHASE (‘FLEXIBLE BENEFITS’) PENSION SCHEME.**

With a score from 1- 10 with 1 being the most important and 10 being the least important, please rank the following points in the space provided. When all have been completed, please sign and complete the section below.

- I wish to receive my retirement income in the currency of the jurisdiction in which I become tax resident at retirement.
- I am concerned about the distribution of my residual pension fund in the event of my death.
- I wish to ensure that my income is remitted to me in the most tax efficient manner.
- I wish to have the ability to postpone receiving my benefits at any time and reinstate them as and when required.
- Subject to fund growth, I wish to have the option of a flexible level of income.
- I wish to have some input with the investment direction of my retirement fund.
- I am concerned about the solvency of my existing scheme and its ability to maintain an escalation income in the future.
- I wish to take advantage of very high exchange rate and remove currency risk
- I want to consolidate my pension while interest rates are very low and cash equivalent transfer values are very high.
- I want to sever all links with my previous employer.

Signed
Client name
Date