

# Transfer-in request form



www.btpensions.co.uk

csu@rpm.co.uk

0800 012 1117

PO Box 300, Darlington, DL3 6YJ

If you wish to transfer benefits from another pension provider you will firstly need to check that your current pension scheme will accept a transfer, then complete this form and return it with a transfer quotation from your previous pension provider.

**It is your responsibility to obtain a transfer quotation from your previous provider and we will be unable to start the transfer process without all the required information.**

Please complete this form using black ink and capital letters, and ensure you sign it before returning.

## Part 1

### Your details

Your member reference:

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Your title (Mr/Mrs/Miss/Other):

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Your first name:

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Your surname:

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Your date of birth:

D	D	/	M	M	/	Y	Y	Y	Y
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Your address:


Postcode:

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Your previous pension provider:

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Your previous pension provider's address:


Postcode:

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Your reference number with previous pension provider:

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## Part 2 – to be completed only if your transfer is from a Money Purchase/Defined Contribution Scheme.

Your transfer will be used to buy units in a range of investment funds. You can choose one or more of the funds available and/or you can choose a Lifestyle strategy where your investments are managed for you. If you already invest into a Lifestyle strategy and want to invest your transfer into a Lifestyle strategy, you must use the same Lifestyle fund and the same Target Retirement Age.

RPMI strongly recommends that you consider speaking to an independent financial adviser (IFA) before making any decisions about your investments. You can find a list of IFAs in your area at [www.unbiased.co.uk](http://www.unbiased.co.uk).

Please note that your fund choices must add up to 100%.

**Lifestyle strategies:** (you may select only **one** Lifestyle strategy)

Long Term Growth Lifestyle	<input type="text"/>	%
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or

Global Equity Lifestyle	<input type="text"/>	%
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and/or

**Self-Select funds:** (as well as a Lifestyle strategy, you can choose from the funds below):

Long Term Growth Fund	<input type="text"/>	%
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Global Equity Fund	<input type="text"/>	%
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Aggregate Bond Fund	<input type="text"/>	%
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Index-Linked and Global Bond Fund	<input type="text"/>	%
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Deposit Fund	<input type="text"/>	%
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<b>Total:</b>	<b>100</b>	<b>%</b>
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### Target Retirement Age (TRA)

Your TRA is used by Lifestyle strategies to gradually switch your investments to less risky funds as you approach retirement (known as de-risking).

We will assume your TRA will be the same as your pension scheme's Normal Retirement Age, unless you tell us otherwise.

If you intend to retire at an age which is different from the Normal Retirement Age for your pension scheme, you can set a personal TRA to be used for your Lifestyle strategy. This will ensure that the switching takes place over the years prior to your chosen TRA.

If you invest in a Lifestyle strategy and you change your TRA for the Lifestyle strategy you are invested in while you are in a period of de-risking, you need to be aware of some important information.

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We need to let you know that, if you increase your TRA, your funds will be 're-risked'. This may mean moving some, or all, of your investments back into more high-risk investments, or changing the proportions invested within the strategy.

**NOTE: Your TRA will default to your Normal Retirement Age if you do not indicate an age.**

Please set the Target Retirement Age for my Lifestyle strategy to

## Part 3

### Data Protection

We may be required to use and share the information you have provided for the purposes set out in the enclosed "data protection – how we use information about you" notification. By signing and returning this form you are confirming that you have read the enclosed Data Protection notification and understand that we will use your personal information as set out in the notification.

**I confirm that all the details are true and I have enclosed a transfer quotation from my previous pension provider.**

Signature:

Date signed:   /   /

**Thank you. Please send this information to the address at the top of the page.**



## Data Protection notification - How we use information about you

We, the Railways Pension Trustee Company Limited and RPMI Limited (each with its registered address at 7<sup>th</sup> Floor, Exchange House, 12 Exchange Square, London, EC2A 2NY) will use your personal details to assess, deal with and pay any benefits you may be entitled to under the rules of the Railways Pension Scheme, The BT Police Superannuation Fund, The British Railways Superannuation Fund, or any other pension fund administered by RPMI. As part of the service we provide we may share your information with other organisations for the purposes of identifying accurate information as to your whereabouts or for the purpose of paying any benefits that you may be entitled to. We will handle your data in compliance with all relevant data protection legislation, including from May 2018 in compliance with the General Data Protection Regulation (GDPR). Each of the Railways Pension Trustee Company Limited and RPMI Limited is a data controller in respect of your personal information for the purposes of applicable data protection legislation. If there is a Pensions Committee for your section, it will also comply with the data protection legislation.

### Purpose of using information

We process information or data for the above reasons/purposes. This information may include:

- personal details
- family, lifestyle and social circumstances
- financial details
- employment and education details
- goods or services provided

We may also need to process sensitive classes of information such as physical or mental health details in order to administer ill health retirement payments and applications.

This information may be obtained from your employer, ex-employer, government agencies, service providers or from yourself.

We will only collect and use your personal information where:

- there is a legal obligation for us to do so;
- it is for our legitimate business interests; or
- you have given us your consent to do so

Our legitimate business interests include fulfilling our role in dealing with, assessing eligibility for and paying any benefits you may be entitled to. We will not use your data for our legitimate business interests if they are overridden by your interests, rights or freedoms.

You do not have to provide the information requested from you, but there may be a delay in the payment of your benefits if that information is not provided.

If we are processing your data on the basis of your consent you can withdraw your consent at any time by contacting RPMI's Data Protection Officer (details shown below). The withdrawal of consent will not affect the processing of personal data carried out before consent was withdrawn.



## Who the information may be shared with

From time to time we may need to share your information with other organisations. Where this is necessary we are required to comply with all aspects of relevant data protection legislation. The types of organisations we may need to share some of your information with are:

- claimants, beneficiaries, assignees and payees
- pension schemes with which the person whose personal information we are processing has an association
- trade and business associates and professional advisers
- healthcare, social and welfare organisations
- financial organisations and advisers
- central and local government
- service providers
- ombudsmen and regulatory authorities
- suppliers
- family, associates or representatives of the person whose personal data we are processing
- tracing agencies

If you qualify for free financial counselling we will give your information to carefully selected organisation(s) with which we have arranged to provide this service. We or they may contact you by mail or telephone. If you do not wish to take advantage of this service, please notify the Data Protection Officer in writing who will forward an acknowledgement to you within 7 days.

## Retention of Data

One of the key principles of the relevant data protection legislation, including the GDPR, is that the personal data we store and process shall be adequate, relevant and limited to what is necessary for the purpose it was originally collected. Our standard policy is for information or data to be kept for only as long as necessary. It is then disposed of in a managed and secure way. However, as pensions are a long term saving vehicle it may be necessary to retain your personal data for the remainder of your life and any dependants' lives in order to pay you the benefits you are entitled to along with any dependant's benefits payable.

## Transferring data overseas

Our core systems, data, and administration services are all carried out and stored within the UK. However, TCS an International multinational information technology service, based in India provide maintenance support. Therefore, on rare occasions it may be necessary to transfer your data overseas to TCS.

Transferring personal data outside the European Economic Area to a third country that does not have adequate data protection is prohibited unless the country has been approved by the European Commission as providing an adequate level of data protection or adequate safeguards have been put in place to ensure the security of the data. As India is currently not on the European Commission's list of countries providing adequate data protection, the Railways Pension Trustee Company Limited and RPMI Limited have taken steps to put in place appropriate and suitable safeguards. RPMI and TCS have entered into a data protection contract using standard clauses adopted by the EU Commission (so-called model clauses). These contain enforceable data subject rights and effective legal remedies for data subjects against TCS. A copy of these are available upon request at the address below.



If at any time we propose to use your personal data for any other reason than outlined above we will provide you with further details as to why and for what reason we intend to do so.

### Completing forms on behalf of a child

If you are completing forms, on behalf of a child we may also hold and use your personal information, which will be dealt with on the same basis as set out above.

### Your Rights

You will have a number of rights under data protection legislation. These include the right to:

- see the information we hold about you;
- request personal data to be amended if it is inaccurate or incomplete;
- request the deletion or removal of personal data where there is no compelling reason for its continued use;
- block or restrict the processing of your personal data in certain circumstances; and
- object to the processing of your personal data in certain circumstances

There is also a right under the GDPR to receive your personal data (in a structured, commonly used and machine-readable format) and to transfer your data to another service provider or data controller. This right applies where your data is being processed on the basis of your consent or in line with a contract to which you are party. Please note that for the majority of members this is not applicable as we rely on our legitimate business interest to collect and process your data rather than individual consent or contracts.

### Further information

If you wish to exercise any of your above rights or have concerns about the processing of your personal data or, on behalf of the child in whose name this claim is made, or wish to raise any issues in relation to data protection, including in relation to the use of it by Railways Pension Trustee Company Limited, RPMI Limited or the Pensions Committee for your section, please contact the Data Protection Officer at RPMI:

Data Protection Officer - Mark Beck  
RPMI  
Stooperdale Offices  
Brinkburn Road  
Darlington  
County Durham  
DL3 6EH  
Tel: 0800 012 1117  
Email: CSU@rpm.co.uk

If you are unhappy with how your personal information is being handled you also have the right to make a complaint to the Information Commissioner's Office, an independent body set up to uphold information rights, who will investigate your complaint.