

PROPERTY SALE OR TRANSFER FORM.

For use with:

- Portfolio Plus Self Invested Personal Pension
- Portfolio Plus Pension

This form is designed to be completed electronically, printed, signed and then submitted to us by post. However, if you do not complete electronically please make sure that you:

- use BLOCK CAPITALS throughout in black ink
- correct and initial any alterations. Please do not use correcting fluid.

The completed form should be signed by each Member and sent to either:

Legal & General
SIPP Service Centre
City Park
The Droveaway
Hove
BN3 7PY

Or for plans bought through Cofunds send to:

Aegon Cofunds Administration
PO Box 17491
Edinburgh
EH12 1PB

Please complete the appropriate sections below that are relevant to your instruction:

1 MEMBER(S) DETAILS

Name	Arrangement number(s)	Date of birth	National Insurance No.	*Product number
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*Intermediary name	*Firm name
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*Please only complete these boxes if you have bought your plan through Cofunds.



Property address

Postcode

Property reference number

Please note: Before the sale or transfer can take place, an up-to-date 'Market Value' of the property must be obtained.

Please confirm the name and address of a RICS (Royal Institute of Chartered Surveyors) qualified surveyor who the scheme can instruct to provide us with this information:

If you don't have a preferred surveyor, please tick here.

Full name

Address

Postcode

Is the property being sold?

Yes No If 'yes', please complete **Section A**

Is the property being transferred to another provider?

Yes No If 'yes', please complete **Section B**

A. Property sale

What is the sale price?

£ (exclusive of VAT, if applicable)

Is the property registered for VAT?

Yes No

If yes, is VAT to be charged? Yes No

Is the property to be sold subject to the existing lease or with vacant possession?

Existing lease Vacant possession

Please state the connection between the purchaser and the Member(s). If none state 'none'

Purchaser's name

Address

Postcode

Agent's details – please provide details of the agent to be instructed (if any)

Agent's name

Company

Address

Postcode

Phone number

Email address

Purchaser's solicitor's details

Name of solicitor

Company

Address

Postcode

Phone number

Email address

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

The solicitor acting on behalf of Legal & General as Trustee will be selected by Legal & General.**B. Property transfer**

What is the value of the property?

£ (exclusive of VAT, if applicable)

Do you think the property should be transferred as a going concern?

Yes No

Please provide details of the solicitors acting on behalf of the provider to whom this transfer is being made:

Name of solicitor

Company

Address

Postcode

Phone number

Email address

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

The solicitor acting on behalf of Legal & General as Trustee will be selected by Legal & General.

I/We hereby authorise the scheme to sell/transfer the property detailed in section 2 on my/our behalf as part of my/our pension pot assets.

I/We acknowledge that in the event of the sale/transfer not proceeding, for whatever reason, all of the costs incurred at that point will be met by me/us as indicated in the relevant **Terms Sheet**.

Member's name

Signature

Date (DD/MM/YYYY)

Member's name

Signature

Date (DD/MM/YYYY)

Member's name

Signature

Date (DD/MM/YYYY)

Member's name

Signature

Date (DD/MM/YYYY)

Please note: All Members must sign before the sale or transfer can commence.



legalandgeneral.com

Legal & General (Portfolio Management Services) Limited

Registered in England and Wales No. 02457525

Registered office: One Coleman Street, London EC2R 5AA

Authorised and regulated by the Financial Conduct Authority.

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