



QROPS Membership Application Checklist

To enable you to enjoy the benefits of QROPS sooner, please take a moment to run through the checklist below. Providing all the documents and filling the relevant fields correctly and legibly, will ensure that your application will be processed quickly.

Please check you have:

- Fully completed and signed all sections of the QROPS Application Form.
- Completed the Nominated Dependents / Beneficiaries section (to benefit after your death should there be any residual fund value).
- Included duly certified, clear copies of your Passport and a recent Utility bill.
- Familiarised yourself with the written information of all fees, expenses and running costs of your plan.
- Ensured the Professional Adviser has signed the relevant sections of the application.
- Included the Transferring (existing) pension scheme(s) **TRANSFER APPLICATION / DISCHARGE FORM TO AN OVERSEAS SCHEME** and completed the relevant sections for each transfer. Note: This step can delay the speed of application and movement of funds into the QROPS.
- Included any additional documentation provided by the Transferring scheme(s) e.g. Further **TRANSFER APPLICATION / DISCHARGE** Forms or the CA1881 (HMRC required document).

AND if intending to subsequently invest your QROPS:

- Attached an Investment Mandate (authorisation for the Nominated Investment Manager to perform specific investments on behalf of the Applicant) and Investment Strategy Policy Statement.
- Included the relevant Indemnity Form(s) (General Investment and/or Offshore Bonds depending on your investment strategy).

AND if intending to draw income or lump sum:

- Fully completed and signed all sections of the QROPS Payment of Benefits Form if intending to draw your PCLS - Pension Commencement Lump Sum and/or Retirement Income from your QROPS.