



PANTHERA

PANTHERA IPP (International Pension Plan) Payment of Benefits

To arrange benefit payments or transfer funds

Note: Failure to complete all details and attach the required documentation will result in return of Payment of Benefits Form

1. MEMBER'S ACCOUNT DETAILS

Member's Title:
Forename(s):
Surname:
Date of Birth:

Address (**Permanent residence**):
.....
.....
Post Code: Country:

Correspondence Address (**if different from above**):
.....
.....
Post Code: Country:

Home Telephone:
Work Telephone:
Mobile Telephone:
Email Address:

2. REASON FOR PAYMENT (Tick relevant box)

- Retirement Income (to be drawn from PANTHERA IPP fund) - **GO TO Section 3.**
- Commutation on Retirement (to be drawn from PANTHERA IPP) - **GO TO Section 3.**
- Pension Transfer (movement of funds) (**GO TO Section 4.**)

3. BENEFIT PAYMENT DIRECT TO MEMBER

Retirement Income / Commutation (to be drawn from IPP fund):

Make **SINGLE / REGULAR*** (**delete as necessary**) payment(s) directly to Member for:
Currency:
Amount:

*Stipulate desired Regular payment frequency:
QUARTERLY / BIANNUALLY / ANNUALLY (**delete as necessary**).

Method of Transfer (**Tick one**):

- Send payment by cheque to the Member's **PERMANENT / CORRESPONDENCE** (**delete as necessary**) address listed in Section 1.
- Send Payment via wire transfer directly to the Member's Bank Account (a wire fee will be deducted from the account balance).

Member's Bank Account Details:

Account Name:
Receiving Bank:
Account No:
SWIFT Code:
Sort Code:
IBAN:

4. MEMBER'S PENSION TRANSFER APPLICATION (Details of the receiving scheme)

Total Transfer:
Currency: **Amount:**

Scheme Name:
 Scheme Address:

 Point of Contact:
 Email Address:
 Telephone:

Trust Deed and Rules attached for new scheme being transferred to **(tick one)**:

- YES
- NO **(Please forward to PANTHERA at earliest opportunity)**

Method of transfer **(tick one)**:

Cash - send payment via wire transfer (as per details below) directly to the Member's New Scheme Trustees' Bank Account (a wire fee will be deducted from the account balance).

In specie – provide details:

Member's New Scheme Trustees' Bank Account:

Account Name:
 Receiving Bank:
 Account No:
 SWIFT Code:
 Sort Code:
 IBAN:

Remarks (For Internal Use Only)

TRUST AUTHORISATION

I hereby authorise the payment as described above.

I certify that this payment is in accordance with the terms of the plan and the Trust Deed dated:

Signature of Trustee:
 Date:

5. MEMBER'S AUTHORISATION

I certify that the information I have provided with respect to my account is true, complete, and correct. I authorise EQUITY TRUST, the Trustee, to process, the disbursement from the account indicated in this instruction. I agree that the Trustee, any of its affiliates, subcontractors, and any officers, directors, employees, or agents, will not be liable for any loss, cost or expense for acting upon my instructions, if it follows reasonable procedures designed to prevent unauthorised transaction.

I acknowledge that I am responsible for reporting this distribution in accordance with the current taxation laws, including applicable penalties.

Member's Signature:

Date:

WITNESS' SIGNATURES

NOTE:

1. Witness signatories must be over 18 and neutral (being neither PANTHERA nor New pension (receiving) scheme staff).
2. Member's require 2 witnesses.

Witness 1 Signature:

Date:

Witness 1 Print Name:

Address:

Witness 2 Signature:

Date:

Witness 2 Print Name:

Address:

