

# Equitable Life

## How Our Transfer Process Works

### How does the process start?

We receive your request to transfer and send you:

- 'How our transfer process works' leaflet and information
- Statement of Value
- Transfer Payment Form



### What do you have to do?

Consider the information we have sent you. If you want to go ahead, you need to:

- contact the receiving company and ask them to send us:
  - their bank details
  - confirmation they will accept the transfer
  - a copy of their HMRC registration certificate
- complete and return the Transfer Payment Form



### What happens then?

Once we have received details from the receiving company and your completed Transfer Payment Form, we make payment:

- by Bankers' Automated Clearing System (BACS)
- normally within 10 working days of receipt of all information

We will send you and the receiving company written confirmation this has happened.

If you would like more information, please contact us:

Website [www.equitable.co.uk](http://www.equitable.co.uk)

Address Equitable Life  
Walton Street  
Aylesbury  
Bucks  
HP21 7QW

Telephone 0330 159 1530 or +44 1296 386242 if you live abroad

Fax 0845 835 5765 or +44 1296 386243 if you live abroad

Email [enquiries@equitable.co.uk](mailto:enquiries@equitable.co.uk)

**You should be aware that sending information by email is not always secure.**

For security reasons, we may not always be able to respond by email.

We are open from 09:00 until 17:00 Monday to Friday.

**Before you make any financial decisions about your retirement savings, we recommend that you seek free impartial guidance or financial advice.**

For security and training purposes, telephone calls may be recorded. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

The Equitable Life Assurance Society is a mutual society registered in England No. 37038.

Registered Office: 20-22 Bedford Row, London WC1R 4JS, United Kingdom.