

Transfer request form

Please return this form to:

Joiner Team

Universities Superannuation Scheme Limited,

Royal Liver Building, Liverpool, L3 1PY

Please complete this form using BLOCK CAPITALS

Member details

Title _____ Surname _____

First names _____

National Insurance number _____

Address (members must complete this section using home address details) _____

_____ Postcode _____

Institution details

Full name of employing institution _____

Scheme details

Employer's name _____ Scheme name _____

Dates of service _____ Reference number _____

Surname known by in this scheme _____

Scheme address _____

If you would like to transfer a second arrangement to USS, please complete the fields below:

Employer's name _____ Scheme name _____

Dates of service _____ Reference number _____

Surname known by in this scheme _____

Scheme address _____

Data Protection

The information obtained as a result of completing this form will be used by Universities Superannuation Scheme Ltd (the Trustee Company) for the purpose of administering your pension, e.g. calculating the benefits due to you from USS. In the course of processing the information for this purpose the Trustee Company may disclose your personal data to personnel at your employer responsible for pension matters and the administrators of the scheme(s) you have identified on this form. By completing this form and submitting it to the Trustee Company you consent to the use of your personal data for the purposes set out above.

My USS

As part of the process of transferring benefits from a former scheme to USS, you may be required to make investment choices for your transfer through My USS, the online service for managing your USS membership. My USS is where you can go to learn about your investment fund options and make your investment choices for the USS Investment Builder, add and manage additional contributions and change your details including your target retirement age. You need to register for My USS using your member number. If you're having trouble finding your USS member number, contact us via the online form at www.uss.co.uk, or call our member service desk on 0333 300 1043. You can access My USS at www.uss.co.uk/myuss.

Declaration by member

To Universities Superannuation Scheme Ltd (the trustee company); I hereby give authority to the trustee company to obtain any information it requires in connection with my pension benefits from the administrators or trustees of any pension scheme of which I am or have been a member. I understand that whilst the trustee company will investigate the potential transfer(s) of benefits from my former scheme(s) to USS and keep me informed of any progress via my employer (typically on a monthly basis), I understand that it is ultimately my responsibility to ensure the transfer is completed.

Name: _____ Position: _____

Member's signature: _____ Date: _____

USS recommends that you contact your former scheme and USS to pursue the transfer should you feel that it is not progressing in a timely manner. USS will write to you via your employer once the transfer is complete, confirming the service secured in USS. Until this confirmation has been received you should not assume the transfer had been completed, even if you have accepted a transfer offer.