

# IVCM (Gibraltar) Retirement Annuity Trust

## Execution-Only Transfer Declaration

Form **5**

### The Trustee

will only accept this form if it is correctly and fully completed.

Any questions, call  
+350 200 69290

### Important Information

Please complete this form if you are transferring your current pension plan or plans to the IVCM (Gibraltar) Retirement Annuity Trust without seeking independent financial advice. In other words you wish to make the transfer or transfers on an **execution-only** basis.

### When complete

email or post this form:

[gibraltar@ivcm.com](mailto:gibraltar@ivcm.com)

### IVCM Trustees (Gibraltar) Limited

215B, Neptune House  
Marina Bay, Gibraltar

Issued by the Trustee  
IVCM Trustees (Gibraltar) Limited  
GSFC FSC1223B

### 1. Member Details

Member number/s

Full name

### 2. Declaration and Signature

I confirm I have neither sought nor been given financial advice regarding the transfer of my existing pension arrangements. I have entered into this transaction on an informed basis after carrying out my own research. I therefore understand IVCM Trustees (Gibraltar) Limited are not responsible for the decision to undertake this transaction. I also understand that IVCM Trustees (Gibraltar) Limited will not provide any financial advice whatsoever.

I confirm I have read the Terms & Conditions for the IVCM (Gibraltar) Retirement Annuity Trust prior to signing this Declaration and that I have had the opportunity to ask any questions related to the transaction.

I understand the charges which will be applied by IVCM Trustees (Gibraltar) Limited. I also understand that I should review my QROPS portfolio, or seek professional financial advice, to ensure the investments match my pension objectives.

I am aware that IVCM Trustees (Gibraltar) Limited will not be liable for any rights to redress relating to my decision to transfer my current pension arrangements to the IVCM (Gibraltar) Retirement Annuity Trust.

Member Signature

Date [dd/mm/yy]