The smart investment platform

How to process a SIPP transfer

User Guide

SIPP Transfers

Obtain the Transfer Authority Form

New Clients

Select **Clients > Register Client** from the Home screen and complete the online application for a new SIPP. See the **Register a new client – SIPP** process guide or **How to submit an SIPP application video guide**.

The Transfer Authority will generate at the end of the application, pre-populated with the details provided.

Existing Clients

Obtain the Transfer Authority by navigating to the **Documents** tab and selecting **SIPP Documents**. This form needs to be fully completed with the transfer details

Send to Novia Global

- The client should sign the declaration on page 2 of the Transfer Authority.
- The signature needs to be an original client signature; electronically signed forms will not be accepted.
- The form can then be scanned and emailed to clientservices@noviaglobal.com along with any discharge paperwork where applicable.
- For Defined Benefit and ROPS transfers, additional documentation/information may be requested.

Transfer is requested

- On receipt of a fully completed Transfer Authority, Novia Client Services will complete any discharge forms and request the transfer from the ceding scheme.
- Transfers will usually be requested electronically via the Origo transfer service.
- The Intermediary can obtain updates on the progress of the transfer from the Latest Status Updates online.

Transfer is received

- Funds are received and applied to client's account.
- Client Services upload the **Cash Receipt Confirmation** to the Documents tab.
- The Cash Receipt Confirmation notifies the Intermediary that the funds have arrived and are available for investment.
- The Intermediary logs in to place the trades on the client's account.

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