

# Aviva Transfer Process on MyAviva

Log into MyAviva  
Click on “details”

The screenshot displays the MyAviva user interface. At the top, a yellow navigation bar contains the AVIVA logo and menu items: Insurance, Investments, Retirement, and Health. On the right side of this bar, there is a search icon and a user profile section for 'Hi Iain' with a 'Your account' dropdown menu. Below the navigation bar, the page is divided into two main sections: 'Your policies' and 'More from us'. The 'Your policies' section features two large icons: 'Pension' (a calendar with a Euro symbol) and 'Motor' (a car). The 'More from us' section consists of four smaller cards, each offering a '10%' discount on 'Travel', 'Life', 'Health', and 'Cancer essentials'. Below these sections, the 'Your pension' details are presented in a table-like format. It includes the policy number 'SP12345678', the total plan value '£56,145.15', the user's payment of '£120/month', and the employer's payment of '£155.47/month'. At the bottom left, there is an 'in Made in InVision' logo. At the bottom right, there are two yellow buttons labeled 'Details' and 'Documents', with a small '</>' icon above them.

Your pension	
Policy number	SP12345678
Total plan value	£56,145.15
Your payment (salary exchange)	£120/month
Your employer's payment	£155.47/month

**Details** **Documents**

You will be taken to the details of your pension policy

The screenshot displays the Aviva pension policy dashboard. At the top, there is a yellow header with the Aviva logo and a blue navigation bar with the user's name 'Hi Iain' and 'Your account' with a dropdown arrow. Below the navigation bar, a dark grey bar shows the pension policy details: 'Pension policy: Designer Stakeholder @ Aviva | SP12345678'. The main content area has a dark blue background with the title 'Your pension' in large white text. Below the title, there are three columns of information. The first column shows the 'Fund value as of today' as '£56,145.15'. The second column shows the 'Estimated fund value at 68 (Change)' as '£181,000.00'. The third column shows the 'Estimated yearly retirement income' as '£12,400.00'. To the right of these values, there is a disclaimer: 'The values at your selected retirement date are based on a medium rate growth assumption, your current payments, investment choice and retirement age. Your pension illustration shows you other projected values and assumptions.' Below the disclaimer, there is a note: 'The values are not guaranteed and the value of your pension fund and any income you receive from it at retirement may be more or less than shown here.' At the bottom right of the disclaimer, there is a 'Show more' link with a downward arrow.

AVIVA

Hi Iain  
Your account

Pension policy: Designer Stakeholder @ Aviva | SP12345678

## Your pension

Fund value as of today

**£56,145.15**

Estimated fund value at 68 (Change)

**£181,000.00**

Estimated yearly retirement income ⓘ

**£12,400.00**

The values at your selected retirement date are based on a medium rate growth assumption, your current payments, investment choice and retirement age. Your **pension illustration** shows you other projected values and assumptions .

The values are not guaranteed and the value of your pension fund and any income you receive from it at retirement may be more or less than shown here.

▼ Show more

Scroll down and click on  
“transfer a pension”

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## Transfer a pension

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Bring your Pension plans together with Aviva to make them easier to manage

You may be able to transfer or consolidate your existing Pensions into one policy. With just one Pension it could be much easier to access the money you've built up when you decide to start planning for your retirement.

Transferring Pensions is not right for everyone. Consider the charges, funds and any valuable benefits which could be lost. Your capital is at risk and you may be required to obtain advice, for which a fee will be charged, before proceeding

[Transfer a pension](#)

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You will need to read the information about transferring and then answer the questions so Aviva can check your pension is eligible to be transferred online

Click on “continue”

## Pension eligibility check

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Answer the questions below to check your Pension is eligible for an online transfer.

You can find the details of the Pension you wish to transfer on the policy documents given to you by your provider.

If you're unsure about the answers to these questions, your other Pension provider may be able to help.

Have you received financial advice about moving your other Pensions to this policy?

Yes

No

Have you already taken benefits from your other Pension funds, such as a tax free lump sum or Pension Income?

Yes

No

You will receive confirmation that your transfer will be allocated into your existing investment approach

If you are happy with this, click on “continue” to move to the next stage of the process

Transfer a pension (Step 2 of 4)

## Allocate your transfer

We will invest your transfer value into your existing investment approach.

### Future Focus II Drawdown Lifestage Approach

If you want to change your investment approach or move to an approach where you choose your own funds please give us a call on the number shown.

Continue

Back

Aviva will then provide you with an illustration of projected benefits based on the transfer amount

Please read the information on this page and click on “continue” if you are happy to proceed

	<b>If this transfer reduces yearly by 0.7%</b>	<b>If this transfer grows yearly by 2.2%</b>	<b>If your fund grows yearly by 5.2%</b>
The value of this transfer could be	£12,000	£29,000	£70,400
If interest rates when you retire are	0.1%	2.1%	4.1%
<b>You'll get either</b>			
The value of this transfer could be	£12,000	£29,000	£70,400
<b>OR</b>			
A tax-free cash sum (up to 25%) of	£3,000	£7,360	£17,600
plus a smaller retirement income each year of	£326	£1,060	£3,200

Check the details are correct

Tick the box to confirm you have read and understood the details

Click on “continue” to complete the transfer request

Transfer a pension (Step 4 of 4)

## Check and confirm

Please check the details below, then read and check the terms.

### Pension to transfer

Provider	Policy number	Approximate value
Canada Life	CA123456789/ABC	£18,589.35



Aviva will email you confirmation of your transfer request

They will start the transfer process and send you confirmation of the transfer once it has been completed

## Transfer a pension

Thanks for your request



We have sent a confirmation receipt to: **iain.oliver@aviva.com**

### What happens now?

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We will email you a copy of your illustration and request the transfer from your other provider. We will contact you if we need any further information or need to discuss anything with you.

Pension transfers usually take between 25-60 days to complete. However, some Pension transfers need to be processed manually and it may take longer for the funds to move across.