

UK Pension Transfers & Specialist Advice



With fully compliant teams in both the UK and Australia, we're here to support you and your clients. We advise on all types of UK pensions – including Defined Benefit/Final Salary pension schemes and Guaranteed Annuity Rates.

PX PENSION
EXCHANGE®

Why partner with PX Pension Exchange?

Accountants, superannuation advisers and other financial professionals in Australia partner with PX Pension Exchange for our highly specialised expertise on UK pension transfers.

With our partnership, you can give your clients a more holistic service – and the most accurate, reliable advice possible.



We're UK final salary/defined benefit pension advice specialists

PX Pension Exchange has the full permissions in the UK to provide regulated advice and sign-off on **UK final salary/defined benefit pensions** – and all other UK pension types.

With qualified actuarial staff, we can independently evaluate a fair value for your client's UK pension and advise on their best next steps. If a transfer is in their best interests, we can work with you to complete it.*



We're based and fully compliant in the UK and Australia

With headquarters in both countries, PX Pension Exchange is fully compliant under the UK Financial Conduct Authority (FCA) and ASIC in Australia.

This makes us one of only a few global teams who can legally advise your clients on their UK pension* and act on their behalf in both the UK and Australia as required.



We're a world leader with a circa 20-year history

When you introduce your clients to PX Pension Exchange, you're introducing them to a global leader in international pension transfers and advice.

Qualified in both the UK and Australia, our financial advisers and actuarial staff have worked with thousands of people who have moved from the UK to Australia – and advised UK pension holders for almost 20 years.

*Undertaken by the UK office.

How we can help your clients

Transferring UK pensions to Australia is not a straightforward exercise – nor is it necessarily in your clients' best interests. Discover how PX Pension Exchange can help you support your clients in this highly complex, ever-changing area.

Pension transfer advice & implementation

As authorised pension specialists, we can advise your clients on UK pensions of all kinds – and help transfer them to an agreed Australian SMSF or superfund.*

Post-transfer support

From tax calculations and withdrawals to QROPS and compliance, we can look after your clients in a variety of ways after their pension transfer.

Strategic pension management

While your clients wait to transfer their pensions, we develop strategies to help them realise greater tax benefits in the UK and Australia.*

QROPS establishment

UK pensions transferred abroad must be transferred into a Qualifying Recognised Overseas Pension Scheme (QROPS). PX Pension Exchange can help establish a QROPS for your clients.

Lost pension recoveries

By tracking down your clients' lost pensions in the UK, we can help grow their wealth and improve their retirement lifestyle.*

UK State Pension entitlements

We can identify whether maximising your clients' State Pension entitlements is ideal. And if it is, how they can do so effectively.

Retirement plans for travellers

If you have clients who live and work outside Australia, we can help create international retirement strategies to suit their changing circumstances.*

Pensions on divorce

If you have clients who are going through a divorce, our international team can provide advice on UK pension splitting and transfers.*

*Undertaken by the UK office.

For UK pension transfers & advice your clients can rely on

Contact PX Pension Exchange today.

Our experts are available 24/7
1300 007 979

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**Pension
TRANSFER**
Gold Standard

Pensions Advice
Taskforce

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