

**SIPPDEAL E-SIPP
TRANSFER DISCHARGE FORM**

Arrangement: AJ Bell Investcentre SIPP

Member: Thomas Fleming

Account Number: SCC852736

To be completed by the Member (Please complete all parts)

Reason for transferring?
(Please select all that apply)

Cost	<input type="checkbox"/>
Preferred provider	<input type="checkbox"/>
Consolidation	<input type="checkbox"/>
Greater flexibility	<input type="checkbox"/>
Service	<input type="checkbox"/>
Other (please specify)	<input checked="" type="checkbox"/> Provide funds to SIPP

Did you receive advice in relation this transfer? Yes ☐ No ☒ (please circle)

If yes, from whom did you
receive advice?
(Please insert details)

Name
Address
Telephone number

How do you wish to transfer your assets?

CASH ONLY

☒

IN-SPECIE

☐

Amount of transfer?

All of my fund ☐ or amount £ 70,000

Method of payment for cash transfer:

BACS - 3 to 5 working days
(No additional charge) *

☒

CHAPS - same day payment
(£25.00 + VAT additional charge) *

☐

*If no method of payment is chosen, then we will look to make the transfer payment by BACS transfer.

I hereby request you to transfer the amount specified above from the benefits to which I am entitled under the arrangement named above, and pay the transfer value to the receiving scheme stated below.

I declare that I am legally entitled to the benefits in question, which the arrangement secures. I agree that payment by you in accordance with these instructions will fully discharge A J Bell Management Limited and Sippdeal Trustees Limited from liability to provide benefits for me under the above arrangement, and I indemnify you against all claims or proceedings made against you in respect of the benefits to be transferred, and against all resulting losses and expenses, which you may incur.

I confirm that neither myself nor any party connected with me will be in receipt of any payment as a result of this transfer and its subsequent investment other than authorised pension and lump sum benefits, payable to me no earlier than from age 55.

Signed by the member in his/her capacity as member to the arrangement



Dated

25/7/16

To be completed by the receiving scheme

Arrangement:

Member:

Account Number:

I/We agree to accept the transfer payment from the above arrangement and confirm the receiving scheme is a registered pension scheme under Finance Act 2004.

Full name of receiving scheme	1850 PENSION SCHEME								
HMRC pension scheme tax reference	00766479RP								
Scheme administrator's name:	PENSION PRACTITIONER. COM								
Address:	DAWS HOUSE 33-35 DAWS LANE LONDON. NW7 4SD								
Telephone number	0800 634 4862								
Type of scheme (please select)	<table><tr><td>Occupational Scheme / SSAS</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Occupational Scheme / non SSAS</td><td><input type="checkbox"/></td></tr><tr><td>SIPP / Personal Pension</td><td><input type="checkbox"/></td></tr><tr><td>Other (please state)</td><td><input type="checkbox"/></td></tr></table>	Occupational Scheme / SSAS	<input checked="" type="checkbox"/>	Occupational Scheme / non SSAS	<input type="checkbox"/>	SIPP / Personal Pension	<input type="checkbox"/>	Other (please state)	<input type="checkbox"/>
Occupational Scheme / SSAS	<input checked="" type="checkbox"/>								
Occupational Scheme / non SSAS	<input type="checkbox"/>								
SIPP / Personal Pension	<input type="checkbox"/>								
Other (please state)	<input type="checkbox"/>								

Please complete this section if type of Scheme is an Occupational Scheme

Pensions regulator reference number	12004499
Sponsoring employer(s) name(s)	EIGHTEENFIFTY INVESTMENTS LIMITED
Company number(s)	07574658
Company registered address	C/O 2ND FLOOR SUITE 16 KINGSWAY ALTRINCHAM, CHESHIRE WA14 1PJ
Employer relationship with member?	DIRECTOR
Is the member also a Trustee? (If yes, please provide a copy of the deed of appointment)	YES
What is the name of the regulated investment service provider for the Scheme?	TILNEY INVESTMENT MANAGEMENT
FCA number for regulated investment service provider named above	124255

Please complete this section if type of Scheme is a Personal Pension, SIPP or Other

Scheme operators name	
Operators address	
FCA number	

Scheme administrator bank details

The transfer payment will be paid directly to the Scheme Administrator's bank (please note that it is not possible to issue a cheque).

For security purposes we may call to confirm the bank account details:

Bank name:	CO-OPERATIVE BANK
Account name:	1850 PENSION SCHEME
Account number:	50096873
Sort code:	08-90-00
The reference to be quoted	T. FLEMING

If the client has requested an in-specie transfer, can you please complete the following: -

Stockbroker Details

Name of stockbroker:	
Address:	
Telephone number:	
Account no / Reference	

Signed: ESNEAOR Dated 26/07/2016
(Authorised signatory of the receiving scheme)

Position: ADMINISTRATOR