

**Transfer Summary**

Client: Anthony Marriott  
Receiving Provider: Cranfords  
Receiving Product Type: SSAS  
Receiving Contract Reference: A C Marriott RBS  
Ceding Contract Reference: 9664101  
Ceding Product Type: IPP  
Transaction Type: P2P  
Transfer Creation Date: 12/01/2015  
Transfer Status: Funds Received

**Transfer Status**

Status: Funds Received  
Date Funds Received: 21/01/2015

**Transfer Timeframe**

Activation Date: 12/01/2015 09:56:14  
Scheduled Completion Date: 24/01/2015  
Expected Completion Date: 24/01/2015  
Transfer Delay Reason: -  
Transfer Alert?: -

**Notes**

Case Notes: -  
Transfer Notes: As discussed, I can confirm that this should be a full fund transfer, please accept my apologies for the error.  
Cranfords 12/01/2015 11:56:23 Andy Johnson

**Product Notes**

Receiving Provider Product Note: -  
Ceding Provider Product Note: Please note all Aegon policy numbers are purely numerical and do not contain any letters. Eg UP/0009330638 should be keyed as 9330638 Death, divorce and bankruptcy cases should be processed off-line

**Receiving Provider Contact Details**

Contact: Toni Haynes  
Email Address: transfers@cranfords.biz  
Telephone Number: 0844 410 0037  
Additional Information: -

**Ceding Provider Contact Details**

Contact: AegonSystem  
Email Address: OrigoProductionSupportMB@aegon.com  
Telephone Number: -  
Additional Information: This is an Aegon System integrated contact. Do not alter this in anyway without referral to IT

**Receiving Contract Details**

Type Of Transfer: Product Based  
Receiving Provider Reference: A C Marriott RBS  
Completed Application Received 12/01/2015  
Date:  
Scheme Tax Reference Number: 00818031RH  
Bank Account: A C Marriott RBS  
Adviser Involved?: No

**Ceding Contract Details**

Transaction Type: P2P

Provider: Aegon  
Ceding Contract Reference: 9664101  
Retirement Date: -  
Pre-Retirement Benefits?: Yes  
Pre-Retirement - Transfer All Funds?: Yes  
Pre-Retirement - Approximate Value: 15,409.00  
Drawdown to Drawdown Transfer?: No  
Product Type: IPP  
Scheme Tax Reference Number: 00619022RA

**Client Details**

Forename: Anthony  
Surname: Marriott  
Date of Birth: 08/05/1970  
National Insurance Number: NS729001B  
Receiving Provider Age Evidence Seen: Yes  
Postal Code: PR9 8QL  
Country: UNITED KINGDOM  
Ceding Provider Age Evidence Seen: No

**Payment**

Date Funds Sent: 15/01/2015  
Payment Method: BACS  
Payment Reference: A C Marriott RBS  
Part of Larger Payment?: No  
Total Transfer Amount: 15,590.44

**BACS/TT Payment Details**

Account Name: A C Marriott RBS  
Account Number: 93031330  
Sort Code: 205744  
Roll Number: -  
Additional Information: Special account to enable client bank accounts.

**This is an individual client bank account**

**Cheque Payment Details**

Payee: CHEQUE  
Address Line 1: 1 The Pavilions  
Address Line 2: Cranford Drive  
Address Line 3: Knutsford Business Park  
Address Line 4: Cheshire  
Post Code: WA16 8ZR

