

Pension Practitioner
Daws House
33-35 Daws Lane
London
NW7 4SD

16 December 2016

Dear Sirs

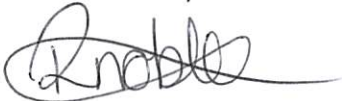
RE: B Bowers – Transfer Out Form

Please find enclosed the above form for Mr Bowers to transfer his existing policy with Aegon to his SSAS with yourselves.

I would appreciate it if you could complete the form in order to continue with the transfer.

Should you have any queries please don't hesitate to contact me.

Yours faithfully



Rhianna Noble
Administration Apprentice

Planholder: Benjamin Bowers
National Insurance JG-52-58-57-B
number:

Plan number: 9702905
Date of birth: 15/08/1978

Part 1 – Receiving scheme payment details

To be completed by the receiving scheme trustees or administrator

Receiving scheme details

Name of receiving scheme/provider: BOWERS SSAS
Our reference: (to be used on all correspondence and payments)
Please confirm either: Direct credit (preferred) or cheque details DIRECT CREDIT
Direct Credit details (if appropriate) Sort Code: Account number: Account payee name:
Cheque details (if appropriate) Cheque made payable to: Address: Reference to be included: (ie plan number or member/planholder name)

Part 2 – Pension transfer confirmation
(Please do not complete if an open market option is required)

1. We undertake that the receiving scheme is: (please tick one only)

- ☐ a registered defined benefit occupational pension scheme
- ☒ a registered defined occupational pension scheme
- ☐ an individual pension plan
- ☐ an unsecured pension plan

2. Receiving scheme registration number

Settlement requirement - Please provide a copy of your HM Revenue & Customs registration certificate which shows the Pension Scheme Tax Reference.

* Delete as appropriate

Receiving scheme declaration

- (a) We declare that the information given above and overleaf is true and complete
- (b) We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with the requirements of the Finance Act 2004
- (c) Where the transfer comes from an unsecured pension plan, we confirm that the transfer will be applied accordingly to provide income withdrawals

Signature:

Company name: Pension Practitioner

Position:

Date:

Part 3 – AEGON transfer instruction

Plan number(s):	9702905
Name:	BENJAMIN BOWERS
Transfer value:	£56762.41
Date of quote:	

The transfer value is not guaranteed. The actual transfer value may vary from this quotation as the value of your investment could fall as well as rise before the transfer is completed. We'll calculate the actual transfer value after we conclude our checks to make sure that we can send the transfer payment to the receiving scheme and are in receipt of the necessary, completed documents.

Before making any transfers, we are obliged to carry out these checks. This could result in a delay or the transfer request being declined.

Please complete the appropriate sections below.

To be completed by the planholder

I wish to transfer my benefits as follows:

Receiving scheme/insurer BOWERS SSAS

- 1. I agree that the actual value settled may be different from that quoted above due to fluctuations in my chosen investment fund, which could fall as well as rise.**
- 2. I agree that payment of the transfer value will be a full discharge of AEGON's liability under all the plans shown above.**

Signature:

Benjamin Bowers

Date

13/12/2016