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Mr PHILIP BUDD
31 The Coppice
Great Barton
BURY ST. EDMUNDS
Suffolk
IP31 2TT

Scottish Widows
69 Morrison Street
Edinburgh
EH3 1HL

Tel: 0345 716 6777
Lines are open 8am-6pm
Monday to Friday

1st June 2023

Our reference: 0016353589

For: PHILIP BUDD

Dear Mr BUDD,

INFORMATION ABOUT YOUR PLAN

Thanks for getting in touch about your plan. We've enclosed the following:

- Current fund value
- Current transfer value
- Transfer Discharge Form (UK) and Receiving Scheme Transfer Declaration Form
- Data Privacy Notice

WHAT HELP HAVE YOU HAD?

Before making a decision, we recommended you consider taking regulated financial advice or get in touch with MoneyHelper at www.moneyhelper.org.uk, a government-backed service offering free and impartial money and pension guidance.

If you don't have an adviser you can find one locally at www.unbiased.co.uk. An adviser may charge you for giving advice.

WE'RE HERE TO HELP

If you need any more information or have further questions, please contact us on the number above and we'll be happy to help. So that we can deal with your queries quickly and efficiently, please quote the reference shown at the top of this letter.

If you change your email or postal address, landline or mobile number, please let us know so that we can update our records to keep in contact with you.

We work hard to keep your personal data secure, which includes regularly reviewing our privacy notice. When there's an important change we'll remind you to take a look, so you're aware of how we use your data and what your options are. Please review the latest privacy notice at www.scottishwidows.co.uk/legalprivacy or call us for a copy on 0345 300 2244.

Thank you for choosing Scottish Widows.

Date of issue
1st June 2023

Plan Number: 80310327
Member: Mr PHILIP BUDD

Tel: 0345 716 6777
8am-6pm Monday to Friday

PLAN VALUATION

Thanks for asking for a valuation for your Personal Pension. Please read the important notes at the end for more information and if you've any questions, contact us on the phone number above. We'll be happy to help.

If you don't have an adviser you can find one locally at www.unbiased.co.uk. An adviser may charge you for giving advice.

PLAN SUMMARY

Plan number	80310327
Planholder	Mr PHILIP BUDD
Date plan started	1st September 2016
Date of valuation	1st June 2023

The value of an investment is not guaranteed and can go down as well as up, depending on investment performance and currency exchange rates (where a fund invests overseas). You could get back less than you invested.

THE VALUE OF THE PLAN ON 1st June 2023

Fund	Number of units	Bid price at 1st June 2023 (p)	Fund value
Scottish Widows Pension Portfolio Two Pension (Series 2)	4,825.091	264.3000	£12,752.71
Total value			£12,752.71

IMPORTANT NOTES

The current value of the plan – how it's worked out

The number of units in each fund is multiplied by the bid price on the date shown.

We've assumed all expected payments in have been paid, if not, the value may be less.

Always remember that past performance of an investment must not be taken as a guide to its future performance.

On early retirement or if the fund is transferred to another pension (the total fund must be transferred), the value above may be different and is not guaranteed.



Date of issue
1st June 2023

Plan Number: 80310327
Member: Mr PHILIP BUDD

Tel: 0345 716 6777
8am-6pm Monday to Friday

TRANSFER VALUE STATEMENT

Thanks for asking for a transfer value for your Scottish Widows Personal Pension.

Please read the important notes at the end for more information and if you've any questions, contact us on the phone number above. We'll be happy to help.

If you don't have an adviser you can find one locally at www.unbiased.co.uk. An adviser may charge you for giving advice.

PLAN SUMMARY

Plan number	80310327
Planholder	Mr PHILIP BUDD

PLAN VALUATION

The transfer value on 1st June 2023 was £12,752.71.

This value isn't guaranteed and will be recalculated on the day of settlement. It also assumes any expected payments in have been paid, if not the value may be less.

IMPORTANT NOTES

Unit-linked funds

The value of an investment is not guaranteed and can go down as well as up, depending on investment performance and currency exchange rates (where a fund invests overseas). You could get back less than you invested.

Always remember that past performance of an investment must not be taken as a guide to its future performance.

Transfer value

This value is the amount we would have paid if we'd received all the required paperwork on 31st May 2023. It's not guaranteed and will be recalculated at the date of settlement. Also, it assumes all expected payments in have been paid, if not the value may be less.

Transferring

It's important to get advice, if considering transferring. A financial adviser can talk through the best options. They may charge for any advice.

If you don't have an adviser you can find one locally at www.unbiased.co.uk. An adviser may charge you for giving advice.

The transfer value can only be paid to another registered pension scheme or to a qualifying recognised overseas pension scheme. The amount will normally be based on the next valuation of units after we receive all correctly completed forms.

Please ask for the forms to transfer, if required.



TRANSFER DISCHARGE FORM

Plan number	80310327
Planholder	Mr PHILIP BUDD
Transfer value	£12,752.71 on 1st June 2023

- Please complete this form in black ink and in CAPITALS, to allow us to transfer your pension.
- Your transfer value will be recalculated when we pay the transfer and this value could be lower or higher than the amount shown above.
- This form is for UK pension transfers only. If you're transferring to an overseas pension scheme let us know and we'll send you the right forms.

DETAILS OF NEW PROVIDER

Name of new provider

Address

Postcode

DECLARATION

- I authorise payment of the transfer value to the scheme/provider detailed above.
- When payment is made to the receiving provider as instructed, this means that I shall no longer be entitled to receive pension benefits from the plan listed above.

Signed,

Mr PHILIP BUDD

Date (DD MM YYYY)

RECEIVING SCHEME TRANSFER DECLARATION FORM

Plan number	80310327
Planholder	Mr PHILIP BUDD
Transfer value	£12,752.71 on 1st June 2023

DETAILS OF THE RECEIVING SCHEME/PROVIDER

Name of receiving scheme/provider	
Address	
Postcode	

The receiving arrangement is a Registered Pension Scheme, as defined in Part 4 of the Finance Act 2004 under the following Pension Scheme Tax Reference (PSTR) number:

Pension Scheme Tax Reference									
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Your reference	
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For payment to be made by BACS, please confirm the following:

Account name	
Account number	
Sort code	
Reference (if required)	

For cheque payment, please confirm the name of the Trustees or Managers of the receiving arrangement that the cheque should be made payable to:

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DECLARATION

We confirm that:

- The above statements are true and complete.
- We agree to accept the transfer value from .

Signed

(for and on behalf of the receiving arrangement)

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Name

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Role

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Date (DD MM YYYY)

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