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User Name: (A0010062)
PSTR 00616190RZ

Pension Schemes - View Current Scheme Details

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Current scheme details

Pension Scheme Name St. James's Place Personal Retirement Plan
Deferred annuity contract / Retirement No
annuity contract made after 5 April
2006

Date scheme registered 05 Apr 2006
Name of Scheme Administrator who registered the scheme St. James's Place UK PLC

Scheme status Open
Sub-scheme No

Pension scheme structure
The scheme is an investment regulated No
pension scheme ?

Band of number of scheme members

Registered for Relief at source No
Occupational pension scheme ? No

Country or Territory scheme established UNKNOWN

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**Inland
Revenue**

National Insurance
Contributions Office

Inland Revenue
National Insurance Contributions Office
Services to Pensions Industry
Personal Pensions
Room BP4102
Benton Park View
Newcastle upon Tyne
NE98 1ZZ

The Scheme Administrator
St. James Place Personal Retirement Plan
St. James Place House
Dollar Street
Gloucester
GL7 2AQ

Telephone: 084591 or 0191 22 50010
Fax: 084591 or 0191 22 50032

If you have access to a telephone, you can use
Telephone: 084591 or 0191 22 50032
Calls to the 084591 number will be charged at Local Call rates.
Your ref:

Our ref: Personal Pensions Team 3
Please use this reference if you write or call

Date: 9 September 2002

RECEIVED

12 Sep 2002

Dear Sir

**APPROPRIATE PERSONAL PENSION
VARIATION TO SCHEME NAME
AT00TR00H**

Thank you for your request to change the name on the above Appropriate personal Pension Plan.

I am pleased to confirm that our records have now been changed as requested and please find enclosed a new Contracting - Out certificate one copy for the scheme records and one copy for the administrator.

I hope this clarifies the situation, however if I can be of any further assistance please do not hesitate to contact me.

Yours sincerely

KEN WALTON
PERSONAL PENSIONS 3

Improving our service to you

We are always pleased to receive your comments and suggestions about how we can improve our service. Please contact us at the address or telephone number shown if you have any comments or are unhappy with our service.

OCCUPATIONAL PENSIONS BOARD

APPROPRIATE SCHEME CERTIFICATE

(Issued under Part I of the Social Security Act 1986/Part II of the Social Security
(Northern Ireland) Order 1986)

OPB Ref: 998151

Issued to

J Rothschild Assurance Personal Investment Plan

Administration Centre

P O Box 64

Stirling

FK9 4YS

In response to an application dated 06/12/91 it is
hereby certified that with effect from 20/07/94, the
above named scheme is an appropriate personal
pension scheme.

Date

22/07/94



Mr Peter D Carr, CBE

Chairman

Issued by the Occupational Pensions Board, Lynwood Road, Thames Ditton, Surrey KT17 0DH

OP 1 (PP) (1/94)

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Pension Schemes

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Pension Scheme Summary

Pension Scheme Name **St. James's Place Retirement Plan**
Pension Scheme Tax **99616190RZ**
Reference (PSTR)
> [View current scheme details](#)

Pension Service Notices for Scheme ②

Registration ②

You have 0 notices for this Pension Scheme

Registration for Tax 05 Apr 2006 View [View cert](#)

> [View all notices](#)



Inland
Revenue

Audit & Pension Schemes
Services
Yorke House
PO Box 62
Castle Meadow Road
Nottingham NG2 1BQ

Telephone: 0115 954 1712
Fax: 0115 954 1930

Malcolm Dunn
Pensions Marketing Consultant
St James's Place
J. Rothschild House
Grafar Street
Glasgow
Glasgowshire
GL7 2AQ

Deputy Director: David Spence

Date: 02 July 2002
Our ref: SP087295/1A
Your ref:

For information and advice
visit our website at the
HM Revenue & Customs

www.hmrc.gov.uk

Dear Mr Dunn

J. ROTHSCHILD ASSURANCE PERSONAL RETIREMENT PLAN
J. ROTHSCHILD ASSURANCE ADDITIONAL RETIREMENT PLAN

Thank you for your letter dated 10th June 2002 and the two amending deeds relating to the above two schemes.

I have examined the two amending deeds dated the 10th June 2002 and I can confirm that they are satisfactory. The approval status of the each scheme remains unaffected.

These amendments mean that the 'J. Rothschild Personal Retirement Plan' has changed to the 'St James's Place Personal Retirement Plan' (reference SP087295/1A) and the 'J. Rothschild Assurance Additional Retirement Plan' which has now become the 'St James's Place Additional Retirement Plan' (reference SP087295/1A). I have noted the amendments accordingly.

Could I request that in scheme specific correspondence our scheme reference numbers be quoted, as this will avoid confusion in the future?

Yours sincerely

S Mee
SARAH MEE

NOTE

Where an amendment is made to either a scheme or any personal pension arrangements made under it, any approval granted under Chapter IV Part XIV Income and Corporation Taxes Act 1988 will cease to have effect unless the amendment (including an amendment made to satisfy the appropriate personal pensions scheme requirements) has been approved by the Board of Inland Revenue (section 631(4) Income and Corporation Taxes Act 1988).

A copy of this letter has been sent to the Inland Revenue, Glasgow Branch, Central Mail (PP), St John's House, Norton Road, Seattle, Renfrewshire, G20 9BB who will contact you regarding the recovery of basic rate tax under section 639(4) Income and Corporation Taxes Act 1988.

Yours faithfully

A. M. N. Fowler

Mrs A M N Fowler



