

Our ref RSMT/MW

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**Strictly Private and Confidential**

Mrs C Featherstone  
87 Westholme Road  
Congleton  
Cheshire  
CW12 4FZ

*Tel # now 0161 200 6080*

22nd February 2010

Dear Mrs Featherstone

**Change to your pension benefits – A E Matthews (Butchers) Limited Executive Pension Plan**

I refer to my previous letters of 20th January and 12th February 2010 and am still waiting to hear from your advisers about transferring your benefits under the scheme. As I have mentioned previously AEGON are unable to settle the other member's benefits until they know what is to happen in respect of your benefits. In turn the scheme cannot be formally wound up until all the member's benefits are settled.

As far as the transfer is concerned, I can advise that the current fund value amounts to £43,196.10. The current transfer value amounts to £42,755.93 which includes a final bonus of £1,995.84 and a market value reduction of £146.84. There are no protected rights included in the transfer value.

In order to get the benefits transferred I am enclosing a Discharge Form which needs to be fully completed (Parts 1 and 2) by the receiving scheme trustees or administrators and returned to me. I will also require a copy of your birth and marriage certificates.

I would suggest that you send a copy of this letter and the form to your advisers and ask them to get this completed and returned direct to me as soon as possible along with the copy certificates requested. If, meantime, you have any queries please do not hesitate to contact me on 0161 819 7432.

Yours sincerely



**M Washburn**

*copy of letter & form sent to Tailormade 23/02  
birth & marriage certificate copies sent  
to RSM Tenon 23/02/10*

For and on behalf of the Trustees of the A E Matthews (Butchers) Limited Executive Pension Plan.





# Pension Practitioner

Freephone: 0800 634 4862  
Fax: 020 8711 2522  
Email: [info@pensionpractitioner.com](mailto:info@pensionpractitioner.com)

Daws House  
33-35 Daws Lane  
London  
NW7 4SD

Transfer Out Section  
AEGON Scottish Equitable  
Edinburgh Park  
Edinburgh  
EH12 9SE

20 July 2010

Dear Sirs,

**Member: Ms Carla A Beatson (now Featherstone)**  
**Date of birth: 14 February 1957**  
**Plan Number: 3835249**  
**National Insurance Number: JX117798C**

Please find enclosed your Transfer out documentation duly completed and signed. I also attach a copy of the HMRC tax registration letter as requested. Please also find correspondence from the member attached.

The transfer payment should be made by BACS to the following account:-

Name of Bank: Investec Private Bank  
Account Name: C & S Pension Scheme  
Account Number: 47227002  
Sort Code: 08-60-68

If you require any further documentation to be completed in order that the transfer can be concluded, please advise me accordingly.

Please note that the SSAS is contracted in and the transfer should therefore only be for the Non Protected Rights portion of the fund.

Please acknowledge safe receipt and that the documentation is all in order.

Thank you for your assistance in this matter.

Yours faithfully

Brad Davis  
**For Pension Practitioner .Com**

Enc





Scottish Equitable

Member: Ms Carla A Beatson  
National Insurance Number: JX117798C

Quote number: ETVQ00032377  
Date of Birth: 14/02/1957

### Part 1 - Receiving scheme payment details

To be completed by the receiving scheme trustees or administrator

#### Transferring scheme details

Name of transferring scheme/arrangement:	A E Matthews (Butchers) Ltd		
Plan/Reference number(s):	3835249	Contract type:	Executive Pension Plan

The transferring scheme(s) is / are a UK registered pension scheme.

#### Receiving scheme details

Name of receiving scheme/provider:	CJS PENSION SCHEME
Our reference: (to be used on all correspondence and payments)	
Please confirm <u>either</u> direct credit (preferred) or cheque details	
Direct credit details: (if appropriate) Sort code: 08-60-68	
Account number: 47227002	
Account payee name: CJS PENSION SCHEME	
Cheque details: (if appropriate) Cheque made payable to: NIA	
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 ☐
- B. Registered defined contribution occupational pension scheme ☒
- C. Individual personal pension scheme ☐
- D. Unsecured pension plan ☐

2. We ~~are~~ are not able to accept contracted-out benefits.

3. Contracting-out basis: Defined benefit/Defined contribution N/A

4. ASCN N/A ECON N/A SCON N/A

5. Receiving scheme registration number 00759386RD

\* Delete as appropriate.

### Receiving scheme declaration

- a We declare that the information we have 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 If contracted-out benefits are being transferred, they will be applied to provide appropriate contracted-out benefits.
- d Where the transfer comes from an unsecured pension plan, we confirm that the transfer will be applied accordingly to provide income withdrawals.

Date: 2010712010

Signed: B. M. Peering

Company name: PENSION PRACTITIONER.COM

Position: HEAD OF ADMINISTRATION



## **Scheme information factsheet**

We can confirm that Scottish Equitable stakeholder pensions are registered under Chapter 2 of Part 4 of the Finance Act 2004. As such, they meet the CAT Standards and all of the conditions set out in section 1 of the Welfare Reform and Pensions Act 1999 (ASCN: A7800026M, pension scheme tax reference: 00619024RG).

We can confirm that Scottish Equitable personal pensions are registered under Chapter 2 of Part 4 of the Finance Act 2004 (ASCN: A7001070A, pension scheme tax reference: 00619022RA).

We can confirm that Scottish Equitable flexible personal pensions are registered under Chapter 2 of Part 4 of the Finance Act 2004 (ASCN: A7001070A, pension scheme tax reference: 00619027RP for non-protected rights and ASCN: A7001070A, pension scheme tax reference: 00619022RA for protected rights).

We can confirm that section 32 buyout plan, which is a registered pension scheme approved under Chapter 2 of Part 4 of the Finance Act 2004.

We can confirm that trustee-proposed section 32 buyout plan, which is a registered pension scheme approved under Chapter 2 of Part 4 of the Finance Act 2004.

We can confirm that Scottish Equitable Section 226 Plans are registered under Chapter 2 of Part 4 of the Finance Act 2004.

We can confirm that Scottish Equitable Occupational Pension schemes are registered under Chapter 2 of Part 4 of the Finance Act 2004.



Re Aegon Scottish Equitable

I have signed a blank authorisation form. I have not completed it as I am not entirely sure it is necessary and to whom it should be sent. In the past, Aegon has refused to accept the authorisation from me, as the pension is held in the name of The Trustees of the A E Matthews (Butchers) Limited Executive Pension Plan.

The Trustees wish to wind up the scheme and they have enlisted the aid of Malcolm Washburn of RSM Tenon Financial Management Limited to assist to this end. I spoke with him today (2<sup>nd</sup> July), and he said that he should be able to provide you with all the information you require directly. He may be contacted on 0161 200 6080. I have also enclosed a letter I received from him dated 22<sup>nd</sup> February 2010, stating what the fund value was at that time. He also enclosed a Discharge Form. He told me today, that he would get all the current value amounts that would be required. Please use him as a first resort to get my pension transferred. If we have to go down the route of The Trustees and Aegon Scottish Equitable we are talking of quite a time delay – one which I would rather not have.

It may be best that I am given all the contact details of who would be speaking to Mr Washburn and I will email him to advise him to expect your call. He did say that he could call you if that is more efficient.

However, if it is not possible to use Mr Washburn's figures, I am providing the following addresses.

The Trustees of A E Matthews (Butchers) Limited Executive Pension Plan  
The Old Rectory  
Cold Higham  
Towcester  
NN12 8LR

Aegon Scottish Equitable  
Aegon  
Edinburgh Park  
Edinburgh  
EH12 9SE

*C. A. Featherstone*

CARLA A. FEATHERSTONE



To:

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.....  
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From:  
Carla Featherstone  
87 Westholme Close  
Congleton  
Cheshire  
CW12 4FD

CG 07

Date:

2010

Dear Sirs,

Please accept this letter as my authority to provide to Pension Practitioner .Com any information that they may reasonably require in connection with my benefits held with you.

Yours sincerely

C.A. Featherstone

Signature





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User Name: (A0104154)

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Featherstone Accounting  
ServicesLtd  
c/o Pension Practitioner .Com  
Daws House  
33-35 Daws Lane  
London  
United Kingdom  
NW7 4SD

Pension Schemes Services  
Yorke House  
Castle Meadow Road  
Nottingham  
NG2 1BG

Tel: **0845 600 2622**  
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

## ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The C & S Pension Scheme has been registered by HM Revenue & Customs (HMRC) on **15/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759386RD**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

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