

Our Reference: EP1/TF00431700

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

29th December 2015

Dear Sirs

### Re: Karen Lisa Winter - NR352801B

I write further to your letter regarding the transfer of the above client's Pension with Transact to your management.

This is to serve as confirmation that an amount of £128,261.21 was transferred via BACS on 22/12/2015 to the bank account requested.

I trust that this information will suffice, but should you require any further information, please do not hesitate to contact a member of the Client Services Team on (020) 7608 5370.

Yours faithfully

**Karen Taylor** 

Regional Client Operations Manager

### SIPP Transfer Form

# **CLIENT INFORMATION:**

Full Name	Karen Lisa Winter
Permanent Address:	5 Hubble View Swindon SN25 2JD
Date of Birth (dd/mm/yyyy)	01/07/1968
NI number	NR352801B
Transact Portfolio No.	333-492-905
Date of Joining Scheme	10/11/2015
Valuation Date	29/12/2015

### SCHEME INFORMATION

Scheme Name	SIPP (Accrual)
PSTR Number	00720366RQ
Type of Scheme	Money Purchase
Governing Legislation	Finance Act 2004

#### TRANSFER PAYMENT INFORMATION:

Amount of Total Transfer: Cash	£128,261.21
Amount of Total Transfer: In-Specie	£0.00
Pension State	Accrual
Has member flexibly accessed pension	No
Date benefits flexibly accessed	N/A

# **DECLARATION:**

- We have fulfilled all our obligations to the SIPP investor, the HMRC or otherwise, which
  are imposed by the SIPP regulations.
- We have transferred to you or your nominee any SIPP investments, held in the clients SIPP at the time of transfer.

	CAMA	201-12-15
Signed:		Date:

For and on behalf of Integrated Financial Arrangements Ltd