

SIPP Transfer Form

CLIENT INFORMATION:

Full Name	Susan Brierley
Permanent Address	6 Cowburn Street LEIGH WN7 5BA
Date of Birth (dd/mm/yyyy)	17/10/1963
NI number	NB647948D
Transact Portfolio No.	461-309-776
Date of Joining Scheme	13/03/2017
Valuation Date	29/03/2018

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	£22,142.91
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.

Signed: *N. Aley*

Date: 29 March 2018

Nastassja Aley
Regional Client Operations Manager