

SIPP Transfer Form
CLIENT INFORMATION:

Full Name	Alison Leadbeater
Permanent Address	6 Price Place CIRENCESTER GL7 1QF
Date of Birth (dd/mm/yyyy)	20/10/1967
NI number	NP294950A
Transact Portfolio No.	623-091-562
Date of Joining Scheme	13/06/2017
Valuation Date	25/06/2019

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	£9,547.90
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: 25 June 2019

Nastassja Aley
Regional Client Operations Manager