

POINTON YORK

HELPING CUSTOMERS SUCCEED

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21 July 2016

Our Ref: V0.4/P304518/RK

Dear Sirs

SIPP Scheme: The PY SIPP
Member: Mr William Michael Briggs
Membership Number: P304518

I write further to recent correspondence regarding the above transfer of benefits.

I confirm that funds have been sent by BACS to your nominated bank account. Please find enclosed a summary of details pertaining to this transfer.

This now discharges the liability of Crescent Trustees Limited for the benefits transferred and all relevant documentation has been passed to you.

Yours faithfully



Richard Kirby | Portfolio Account Manager
POINTON YORK | HELPING CUSTOMERS SUCCEED
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The information provided in this communication is based on our understanding of the current legislation governing pensions.

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TRANSFER OUT PROVIDER SUMMARY

Transferring Scheme:	The PY SIPP
Member:	William Michael Briggs
Designation:	P304518
Receiving Scheme:	Doncaster Electrical Services Ltd Retirement Benefit Scheme

Full Transfer ☒
Capped Drawdown ☒

Partial Transfer ☐
Flexi-Access Drawdown ☐

Scheme Approval number	00605328RH
Scheme	Registered Pension Scheme
Subject to any orders	None
Certificates/documents of title attached	Yes / No

TOTAL FUND VALUE TRANSFERRED	£140,009.21
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Asset Details	Cash Amount	In Specie Value
Barclays Scheme Bank Account	£1,564.21	-
Physical Gold Ltd	-	£138,445.00

BREAKDOWN OF TRANSFER VALUE

The above transfer value represents

Fund type:	Value	Arrangements
Uncrystallised funds ('unvested funds'):	£Nil	-
Crystallised funds:		
Pre 06.04.06	£140,009.21	-
Post 06.04.06	£Nil	-

TRANSFER IN DRAWDOWN - Pre 06.04.06

Fund value at date of transfer	£140,009.21
Date vested	23/06/2004

Current Income Year

Period	Pension Paid
23/06	£Nil
n/a	
25/07/2014	

Frequency

Date Last pension payment


Last Review Date

Next Review Date

Max GAD (1505)

23/06/2015
23/06/2018
£9,934.07

Manager:

Manager's Sign Off		Date: 22/7/16
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