

## American Express UK Pension Plan (the Plan)

### Transfer Application

55802

You should read the content of this confirmation carefully before signing. If you do not understand any point please ask for further information. If you do not sign this confirmation, the Trustees of the American Express UK Pension Plan will not be able to process your transfer request.

To: The Trustees of the American Express UK Pension Plan ('the Trustees')

From: (Member details to be provided below)

Full name:

LISA JONES

Date of birth:

16/10/1962

National Insurance number:

NA373920B

Date pensionable service ended:

30/09/2002

Date employment ended:

(if applicable)

Contact address:

MARCHANTS BARN, MARCHANTS  
CLOSE, HURSTPIERPOINT,  
WEST SUSSEX, BN6 9UZ

### Application for transfer from the

#### Plan to the:

(Provide name of the UK registered pension scheme/qualifying recognised overseas pension scheme to which benefits are to be transferred – the 'Receiving Scheme')

## American Express UK Pension Plan (the Plan)

Mrs LJ Jones - NA373920B

**To be completed by the member where all benefits in the Plan are to be transferred to a single arrangement\*:**

I have received a 'Statement of Entitlement' showing that I can transfer a guaranteed cash equivalent of

£483,966.77 representing my benefits in the Plan as a Pre1996 member into a suitable scheme/policy of my choice provided I make a valid, written application before \_\_\_\_\_ this date being the end of the three-month guarantee period.

I have received an estimated cash equivalent of £67,126 representing my AVC benefits in the Plan.

I would like to transfer the amount representing all of my benefits in the Plan to the Receiving Scheme detailed below.

Name of Receiving  
Scheme: \_\_\_\_\_

Contact name: \_\_\_\_\_

Contact address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Contact phone number: \_\_\_\_\_

**\*Should you wish to transfer out your Pre 1996 Plan benefits only, your AVCs only or transfer each type of benefit to different arrangements, please contact the scheme administrator immediately to request the forms that you will need.**