

**Drawdown Review Certificate**

Scheme Name:

FOUR LEGGED STOOL PENSION SCHEME

## Member Details

Title

MR

Gender

MALE

Surname

HAINES

Forename(s)

PHILIP GEORGE

Date of Birth

17/02/1951

Age Attained

69

Date of last review

24/06/2014

Value of arrangement at the date of last review

£201,712.51

Maximum income drawdown at last review

£16,943.85 pa

Date of review

24/06/2020

Value of arrangement at the date of review

£180,230.28

Valuation date used

24/06/2020

UK GILT indices rate as at review date

0.50%

UK GILT indices rate rounded down to nearest 0.25%

0.50%

GAD rate used per £1000 of fund

£51

Basis Amount

£9,191.74 pa

Current Maximum GAD income limit (150%)

£13,787.62 pa

Date of next review

24/06/2023

Signed



Date

12/7/2021



LANCING, BN15 8GB

MS J BRADY  
HARTSFIELD TRUSTEE SERVICES LIMITED  
HARTHAM PARK  
CORSHAM  
WILTSHIRE  
SN13 0RP

Plan Number:  
**C141N306, C141L307**  
Our reference:  
**FRIST/DS**

5 January 2016

Dear Ms Brady

**Flexible Retirement Plan**  
**Personal Pensions Plan: C141N306**  
**Income Drawdown Plan: C141L307**  
**Name: Mr P Haines**

Thank you for your letter of 8 December 2015 confirming Mr Haines has asked us to make a transfer payment to your company.

The transfer is from the Prudential (SAL) Personal Pension Scheme. This is an appropriate personal pension scheme. The HMRC pension scheme tax reference number is 00605330RK and the ASCN number is A7001074K.

I have arranged for two payments to be paid. They have been paid using the Banks Automated Clearing System (BACS). The last four digits of the bank account used are 0259. The payments are split as follows:

Personal Pension Plans	£10,768.95
Income Drawdown Plans	£212,017.67

No further tax free cash may be taken from the income drawdown portion of the transfer value.

This is not part of a block transfer. There is no Protected Tax Free Cash or Retirement Age.

**Important information for income drawdown plan**

<b>Income Drawdown Plan</b>	<b>C141L307</b>
Transfer amount for plan	£212,017.67
Drawdown type	Capped
Maximum yearly income limit	£16,943.85 before tax
Date of last maximum income review	24 June 2014
Total income paid in current GAD year	£0.00
Original drawdown date	24 June 2014
Original amount paid in (after tax free cash sum)	£201,712.51
Lifetime Allowance used by this plan	21.51%

Although Mr Haines is not an employee of Prudential and has not received any income we must provide a P45. Therefore I'm enclosing a P45 which confirms no income has been paid in the current tax year.

## How to get in touch with us

If you have any questions or if there's anything we can do to help, please get in touch. Please have the plan number to hand when you contact us.

**Post:** Write to us at Prudential Customer Services, Lancing, BN15 8GB

**Phone:** 0808 234 2372 or +44 178 644 8844 if phoning from abroad. Our lines are open between 9am and 5pm, Monday to Friday.

**Secure Message:** Send us a secure email at [www.pru.co.uk/prumail](http://www.pru.co.uk/prumail)

**Fax:** 01786 405 123

Yours sincerely



Tracy Harris  
Customer Service Director

Encl: P45