

PRUDENTIAL

2017

MR B FRISBY
95 TUCKERS ROAD
LOUGHBOROUGH
LEICESTERSHIRE
LE11 2PH

How to contact us
Telephone Number:
0345 602 0361
Deferred Annuity Reference Number:
140233 1490000042

Dear Mr Frisby

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DEFERRED ANNUITY POLICY PURCHASED BY THE MORRIS PENSION PLAN

TRANSFER VALUE QUOTATION

Thank you for your recent correspondence.

Please find enclosed your transfer value quotation paperwork. The transfer value was calculated on 4 June 2016 and is guaranteed until 4 September 2016. If you wish to accept the quotation, all relevant pages of the transfer value paperwork must be completed and returned by the guarantee date.

If you have changed your name we will require evidence to support every name change. This may be in the form of marriage, decree of divorce or deed poll certificates.

Please note that we will only issue a maximum of two transfer quotations in a twelve-month period.

Benefits under this policy arise from membership of a defined benefit occupational pension scheme. The scheme is now closed and has completed winding up. The scheme has secured benefits with Prudential as a deferred annuity. As the benefits originate from a defined benefit arrangement, the benefits are guaranteed. They provide a set level of income in retirement, which may be protected against inflation both before coming into payment and then once in payment (please refer to the enclosed transfer value quotation for further details).

You can elect to transfer your benefits to another registered pension scheme, or a qualifying recognised overseas pension scheme. Benefits can be transferred at any time up to your normal retirement date (as stated in the enclosed transfer value quotation). In accordance with your policy, it is not possible to transfer to another pension arrangement after this date.

Please note should you wish to transfer your benefits to a scheme that is not a defined benefit pension scheme (such as a personal pension scheme) and you are not transferring to an arrangement to immediately purchase an annuity, then legislation requires that you take financial advice from an adviser authorised by the Financial Conduct Authority (FCA) to advise on pension transfers.

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