

SOLICITORS AND PENSION SCHEME PRACTITIONERS

Tel: 01752 250821 Fax: 0844 7700154 email: enquiries@fenwick.org.uk

ALL QUESTIONS SHOULD BE ANSWERED

Name of Scheme	CHLOE CONNOR PENSION SCHEME	Name of Introducer:	GORDON HOFF
Name of Company/ Employer establishing the Scheme	CHLOE CONNOR LIMITED		
Employer Serving Address for Pension Correspondence	46, JAMAICA STREET, LIVERPOOL L1 0AF		
Nature of the scheme establisher's business:	DORMANT		
Employer corporation/partnership tax reference:		VAT reference:	N/A
Employer PAYE reference:	N/A	No. of Employees:	1
No. of years Trading (Employer):	0	Telephone Number:	0151-708-6569
Employer Self-Assessment Unique Taxpayer Reference (UTR) (Sole Traders):	N/A		
Contact Name/Email			

Accountant Details

Name of the Company	DLB SMD
Contact Name	DAVID BATES
Telephone Number	0151-708-6569
Email Address	david.bates@dlbsmd.co.uk
Address	46, JAMAICA STREET, LIVERPOOL L1 0AF

Financial Advisor/ Agent Details

Name of the Company	STEVENSON PRIDE
Contact Name	SHAUN DAYKIN
Telephone Number	01283-733100
Email Address	shaun@stevensonpride.co.uk
Address	24 TINSELL BROOK, HILTON DERBYSHIRE DE65 5HY.

Trustees

Trustee 1 Title (Mr, Miss, Mrs)

MR

Forename(s)

MARK EDWARD

Surname

PATRICK

Date of Birth

06/07/65

Proposed Retirement Date

National Insurance Number

NH205565C

Home Address:

5, LONG ROW, CASTLE EATON, SWINDON, WILTS SN6 6LB

Home Tel:

01285-810911

Work Tel:

07933-149881

Email Address:

mef1@hotmail.co.uk

Is this Trustee also a Member?



Yes



No

Trustee 2 Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Home Tel:

Work Tel:

Email Address:

Is this Trustee also a Member?



Yes



No

Trustee 3 Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Home Tel:

Work Tel:

Email Address:

Is this Trustee also a Member?



Yes



No

Trustee 4 Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Home Tel:

Work Tel:

Email Address:

Is this Trustee also a Member?

☐

Yes

☐

No

Further Information

Name of Ceding Transfer Scheme 1 SCOTTISH WIDOWS Transfer Value: £18,218

Ceding Transfer Scheme 1 Plan/Reference Number Z0303583

Ceding Transfer Scheme 1 Policy Holder: MARK EDWARD PATRICK

Name of Ceding Transfer Scheme 2 FRIENDS LIFE Transfer Value: £25,356

Ceding Transfer Scheme 2 Plan/Reference Number 9921752

Ceding Transfer Scheme 2 Policy Holder: MARK EDWARD PATRICK

Are completed signed discharge forms for each enclosed? ☒ Yes ☐ No FRIENDS ONLY.

Please email this form and any pension discharge completed forms, along with the signed trust deed below PLUS certified copies of your passport/or drivers licence and counterpart PLUS certified copies of a utility bill (not phone bill) within last 3 months to:

enquiries@fenwick.org.uk

Fenwick Solicitors

34 Lipson Road

Plymouth Devon

PL4 8PW

Signed on behalf of Employer:



Dated:

21/8/14.

All Trustees and employer should sign the highlighted last 2 pages of the attached of the trust deed as shown. By signing those two pages you authorise us to approve a trustee bank account on your behalf and enter a copy of your signature on those pages in the bank mandate we complete on your behalf. Guidance in square brackets should be deleted complete & post to us.