

Transfer discharge form

To be completed by the planholder.

Plan number(s)	593055
Planholder	Mr GREG THOMPSON
Scheme name	GPP for Reg Vardy

Please remember: The amount paid will be recalculated when we pay the transfer and this may be higher or lower than the transfer value quoted previously.

Please remember: We will cancel the units and calculate the transfer value using the unit prices at the date of receipt of all the items requested, fully completed, together with any supporting documents. The amount transferred may be higher or lower than the figures shown previously.

Any incomplete or missing information will delay both the cancellation of units and the transfer payment to the receiving scheme.

I authorise you to transfer the above plan to:

(Please provide the full name and address of the pension provider or pension scheme set to receive the transfer payment.)

Name of new scheme/pension provider	Greg Thompson Pension Scheme
Address	C/o RC Administration Ltd 1A Park Lane Poynton Cheshire
Postcode	SK12 1RD
Reference number	N/A
New contact name	Georgina Martin
New contact telephone number	0330 311 0839
New contact e-mail address	info@rcadministration.com

Partial transfer

If you'd like to request a partial transfer please provide details in the box below.

Please clearly write the total amount you wish to transfer out from your fund.

The minimum amount which can be transferred is £10,000.00

After any partial transfer, at least £30,000.00 must be left in your fund.

Transfer discharge form continued

Unless you tell us otherwise, we'll take an equal amount from each fund you have with Prudential. However, if you want to specify the fund(s) and/or the amount(s), please write the fund name(s) and the amount(s) to be transferred in the table below. If you wish to transfer the entire fund, please tick the All box.

Fund name	Amount (£)	All (please tick)
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If you'd like to discuss which fund(s) you want the transfer to be taken from, please call us.

Note: Lifestyle option – unless you tell us that you want to opt out of lifestyleing, your remaining fund value will automatically rebalance to the appropriate proportions for the stage you're at in your approach to retirement. For further details please visit pru.co.uk/lifestyleing.

Please add any special instructions regarding this transfer in the box below:

Special instructions	
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How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, LANCING, BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

In relation to the plan listed above, I agree to, and request, the transfer of benefits as indicated above.

Planholder's declaration

Please read this declaration carefully before signing it. If you believe one or more of the statements below is/are not true in relation to the proposed transfer, and as a result you cannot sign the declaration, we may not be able to/cannot proceed with the transfer.

In relation to the plan listed above, I hereby declare:

- I agree to, and request, the transfer of benefits as indicated above.
- I understand the transfer value is not guaranteed. It will be recalculated before the payment is made, and may be higher or lower than the amount shown previously.
- I am the legal owner of the plan and am legally entitled to instruct you to transfer the value. I have never been adjudged to be bankrupt, there are no court orders and/or insolvent events affecting my plan.
- I understand and agree that payment of the transfer value will be in full and final discharge of your liabilities in respect of the benefits under the plan number stated above.
- I understand that if I have any entitlement under the Prudential plan(s) to a protected tax free lump sum, this may be lost upon transfer unless part of a block transfer or you've also registered for primary or enhanced protection. A protected pension age may also be lost upon transfer.

My date of birth is 24 June 1975.

Transfer discharge form continued


- I declare that my date of birth shown and that the statements that I have made are correct and complete. I understand that making a false declaration may result in tax charges and other penalties.
- I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan(s).
- I also promise that I will be responsible for any losses and/or expenses which are the result of any untrue, misleading, or inaccurate information deliberately given by me, or on my behalf, either in this form or with respect to the benefits from the plan(s).

If you are concerned or have queries about one of the statements, please don't hesitate to contact us.

If you've previously been adjudged bankrupt; subject to a Debt Relief Order, Individual Voluntary Arrangement, Administration Order or another insolvent event; or your plans are/have been potentially affected by any other court orders, so that we can make the appropriate enquiries to decide whether or not the transfer can proceed, please contact us and provide us with relevant details/documentation, such as:

- a copy of the order concerned
- court/insolvency service reference number
- details of the court or insolvency service office, official receiver's office, insolvency practitioner and/or solicitors.

If you believe all other relevant parties concerned have consented to the transfer, please provide documentation to confirm. Please note we can't provide you with legal, financial or tax advice, and you should obtain such advice independently if you feel it's required.

Planholder's signature	
Name	GREG THOMPSON
Date	19/11/2021

Please provide a telephone number below which we can use to contact you between the hours of 8.30am and 6pm, Monday to Friday.

Preferred daytime contact number	07971 845816
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Before signing, if you're unsure of any of the terms we've used, please call us using the contact details in our covering letter.

Please note, if the new agreement is cancelled with the scheme indicated above, we may not be able to accept the transferred money back in to your original contract.

000026 PRVF005M PR52MTC4IP7U4 9610211473

Mr GREG THOMPSON
376 ECCLESALL ROAD SOUTH
SHEFFIELD
S11 9PY

Date of this letter

15 September 2021

Plan number

593055

Scheme name

GPP for Reg Vardy

Planholder

GREG THOMPSON

Transferring your pension

Dear Mr THOMPSON



- The transfer value of your pension is £4,685.67 on 15 September 2021. This value isn't guaranteed and could go down as well as up.

Thanks for letting us know that you would like to transfer your pension.

- We've given you the transfer value and information to help you make sure that a transfer is right for you.
- If you decide to transfer, there are some forms you need to complete and the new provider will also ask you for information. We've enclosed all forms and included instructions in the 'Transfer document checklist'.
- Once we have everything we need, we'll send the transfer payment directly to the new provider, and we'll let you know when this has happened.

Helping you make the right decision

Choosing to transfer your pension is a big decision. Once you've transferred, you might not be able to change your mind. To fully understand your options and make the right choice:

- Read this letter and other enclosed documents carefully.
- Consider obtaining free and impartial guidance about transferring your pension from Money Advice Service at www.moneyadviceservice.org.uk and Pensions Advisory Service at pensionsadvisoryservice.org.uk.
- You should consider seeking financial advice for major financial decisions. If you already have a financial adviser, we recommend you speak to them. If you don't have a financial adviser, you can search for an independent financial adviser in your area by visiting unbiased.co.uk.

Receiving scheme's transfer statement

Section 1 – Details of transferring scheme/ planholder

Scheme name	GPP for Reg Vardy
Planholder name	Mr GREG THOMPSON
Planholder date of birth	24 June 1975
Planholder NI number	JC761213B
Plan number(s)	593055

Section 2 – Details of receiving scheme

This document should only be used for a transfer to a UK registered pension scheme.

Full name of receiving scheme/ provider	Greg Thompson Pension Scheme
Your plan number	N/A
HMRC reference (PSTR or SF number)	20004516RJ
Scheme administrator's name	RC Administartion Ltd
Scheme administrator's address	1A Park Lane Poynton Cheshire
Postcode	SK12 1RD
Name of contact (in case of enquiry)	Georgina Martin
Telephone number	0330 311 0839
Email address	info@rcadministration.com

Type of scheme – the scheme is a: (please tick the relevant box.)

- A) A pension scheme registered under Chapter 2, Part 4 of the Finance Act 2004.
- B) A statutory pension scheme (as defined in Chapter 1, Part 4 of the Finance Act 2004).



If you have ticked option A please enclose a copy of the scheme's HMRC registration document.

Transfer statement continued

Additional details

Is the scheme:

- | | | | | |
|---|-----|-------------------------------------|----|-------------------------------------|
| (i) a non-insured self-administered scheme or a self-invested pension plan? | Yes | <input checked="" type="checkbox"/> | No | <input type="checkbox"/> |
| (ii) an insured scheme? | Yes | <input type="checkbox"/> | No | <input checked="" type="checkbox"/> |
| (iii) a public service pension scheme as defined in s150(3) FA2004? | Yes | <input type="checkbox"/> | No | <input checked="" type="checkbox"/> |
| (iv) a buy-out (deferred annuity) contract? | Yes | <input type="checkbox"/> | No | <input checked="" type="checkbox"/> |

If the scheme is an insured scheme, or a buy-out contract, we will usually make payment only to the life office insuring the scheme or contract.

Section 3 – Payment details

Please note that if your scheme is fully insured then we will pay the transfer payment directly to the new insurance company, in accordance with HMRC requirements. If the transfer is to a non-insured scheme we will pay directly to the receiving provider or administrator.

Our preferred method of payment is BACS.

(a) If you would prefer payment by BACS please provide us with details of the account into which you would like payment to be made.

Sort code	23-83-96
Account number	04919088
Account name	Greg Thompson Pension Scheme
Name of bank	Allied Irish Bank (GB)
Reference number	Greg Thompson Prudential

(b) If you would prefer payment by cheque, to whom should the transfer cheque be made payable?

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This is the scheme/contract's: administrator ☐ trustees ☐ insurer ☐

(c) Where should the cheque be sent (complete if different from above)?

Name	
Address	
Postcode	

Transfer statement continued

Section 4 – Receiving scheme declaration

This section is to be completed by an authorised signatory of the receiving scheme

We hereby declare

- we are willing to accept the transfer payment
- the transfer payment will be used to provide relevant benefits under a UK registered pension scheme, in line with Part 4 of the Finance Act 2004
- the information given in this questionnaire is complete and correct; and
- we consent to you referring this proposed transfer to HMRC and for HMRC to provide information to you relating to the registration of the receiving scheme.

Signed for and on behalf of the receiving scheme:

(Please note: if the new agreement is cancelled with the scheme indicated above, we may not be able to accept the transferred money back in to the original contract.)

Authorised signatory	please sign here
Name of signatory	Georgina Martin
Contact phone number	0330 311 0839
Position/title of signatory	Administrator
Date signed	19/11/2021