

Informatix
Pension Practitioner.com
Daws House
33-35 Daws Lane
London
NW7 4JO

Our ref: CB6652/RB/VB

23 March 2015

Dear Sirs

The Curtis Banks SIPP – J S Ladhur
Transfer From: Informatix Oneview Pension Trust
National Insurance Number: NH680679C

Please find enclosed completed transfer discharge forms required to transfer Mr Ladhur's policy with yourselves to his Curtis Banks SIPP. Please accept this as our confirmation that we can accept the transfer.

The Curtis Banks SIPP is a registered pension scheme with the HMRC Pension Scheme Tax Reference 00740779RV.

Please note that we are not able to accept an Open Market Option.

If you are able to send the transfer value via BACS rather than issue a cheque, the SIPP account details are as follows:

Bank:	Barclays
Sort Code:	20-57-40
Account Number:	13962741
Account Name:	Curtis Banks Ltd Client Receipt Account
Reference:	CB6652 (Please include when making payment)

Once the transfer has completed I would be grateful if you could complete and return the enclosed Transfer Details Form for our records.

If you have any queries please do not hesitate to contact me.

Yours faithfully

A handwritten signature in blue ink, appearing to read 'Rebecca Budd'.

Rebecca Budd
Account Manager
DDI: 0117 910 0590
Email: rebecca.budd@curtisbanks.co.uk

Encs.

SIPP TRANSFER FORM

Please complete this form to request a transfer into your SIPP with ourselves.

Your full name

Your SIPP Number

Name of the other pension plan

Type of plan (occupational/personal etc)

Address

Contact name/number

Policy/account number (if known)

Expected full transfer value of the plan

Are any benefits already in drawdown under the plan?

☐ FULLY ☐ PARTIALLY ☒ NO

Does the transfer consist of assets other than cash?

☐ YES ☒ NO

If yes, please list the types of assets and their values

Is the transfer a credit as a result of a Pension Sharing Order?

☐ YES ☒ NO

Have you received advice from a regulated financial adviser in respect of the transfer?

☒ YES ☐ NO

Is the plan a defined benefits scheme?

☐ YES ☒ NO

Is the transfer part of a block transfer?

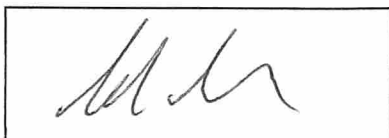
☐ YES ☒ NO

If yes, please provide details of any protected tax free cash entitlement, minimum pension age etc which is being preserved by the block transfer

Declaration

- I make the following declaration to the administrators of any plans from which I am transferring to the SIPP:
 - I authorise and instruct you to transfer funds from the plan listed above directly to Curtis Banks. Where you have asked me to give you any original policy document(s) in return for the transfer of funds and I am unable to do so, I promise to accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer listed above.
 - I authorise you to release all necessary information to Curtis Banks to enable the transfer of funds to Curtis Banks
 - I authorise you to obtain from and release to my financial adviser any additional information that may be required to enable the transfer of funds
 - If an employer is paying contributions to the plan listed above, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the plan
 - Until this application is accepted and complete, Curtis Banks' responsibility is limited to the return of the total payment(s) to the administrators of the current plan
 - Where the payment made to Curtis Banks represents all of the funds under the plan listed above, then payment made as requested will discharge the administrator of the current plan of all claims and responsibilities in respect of the plan listed
 - Where the payment made to Curtis Banks represents part of the funds under the plan listed above, then Curtis Banks will be discharged of all claims and responsibilities only in respect of the part of the plan represented by the payment
- I promise to accept responsibility in respect of any claims, losses and expenses that Curtis Banks and the administrator of any transferring plan may incur as a result of any incorrect information provided by me in this application or any failure on my part to comply with any aspect of this application.
- The transfer will be used to provide benefits under my SIPP administered by Curtis Banks, in accordance with the Rules of the SIPP.
- I am not bankrupt and there are no court orders affecting my pension arrangements.

Signature

A rectangular box containing a handwritten signature in dark ink.

Date

11/03/2015

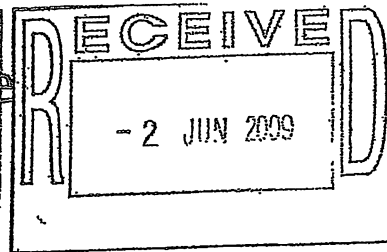
Please return this completed form to:

Bristol Office
Curtis Banks Ltd
3 Temple Quay
Bristol
BS1 6DZ

Dundee Office
Curtis Banks Ltd
Floor 10 City House
Overgate Centre
Dundee
DD1 1UQ



HM Revenue
& Customs



Registration Certificate

225003:00000018:001

Curtis Banks Plc
15th Floor
Colston Tower
Colston Street
BS1 4UX

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel 0845 600 2622
Monday to Friday 09:00 - 17:00

Fax 0115 974 1480

Acknowledgement of registration for tax relief and exemptions

The Curtis Banks SIPP.

has been registered by HM Revenue & Customs (HMRC) on 22/05/2009. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is 00740779RV. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.