

**Abbey Life**  
100 Holdenhurst Road  
Bournemouth  
BH8 8AL

**Client Line**  
**0845 9600 900**

**Textphone (for deaf callers only)**  
**0845 6000 355**  
Lines open between 9am and 5pm Monday to Friday  
(excluding bank holidays)



**Abbey Life**

Joe Bloggs Property Limited SSAS  
Pension Practitioner.com  
Daws House  
33-35 Daws Lane  
London  
NW7 4SD

Our ref: CS/PENSENQ  
11 September 2014

## Transfer Value Information

Dear Sir/Madam

**Abbey Life - Personal Pension**  
**500010743P**                      **Neil William Graham**

Your Reference/Policy Number: 3301-30385-3

We refer to your recent enquiry regarding the above member's benefits.

The enclosed Transfer Value Statement should provide all the information needed.

Yours faithfully

Client Services Division

## Pension Transfer Value Payment Information Form

To: Joe Bloggs Property Limited SSAS Receiving company/scheme  
Your Reference/Policy Number: 3301-30385-3

### Member Details

Policyholder: Neil William Graham  
Policy Number: 500010743P  
National Insurance Number: WM390463A  
Date of Birth: 23 June 1962

### Payment Details

The payment was made by cheque on 11 September 2014.

The payment consists of the following:

Total Transfer Value Payment £38,561.91

This includes Former Protected Rights of £38,561.91

### Transferring Plan Details

- The transferring scheme/plan is a Personal Pension Plan, which is treated as a Registered Pension Scheme under Chapter 2, Part 4 of the Finance Act 2004.
- HM Revenue & Customs (HMRC) Registration Reference: 00605377RB (Where the registration reference number has not been allocated yet, the previous Inland Revenue Reference is shown.)
- The transferring scheme/plan is a money-purchase arrangement.
- We confirm that we have transferred the full fund and no Tax-Free Lump Sum (pension commencement lump sum) has been paid to the member.

### Divorce/Dissolved Civil Partnership Details

- Earmarking order/attachment?:
- Is any part of the transfer as a result of a pension share on a pension payment?

### Lifetime Allowance Details

- The above Transfer Value represents 3.08% of the current Lifetime Allowance.

Prepared by Abbey Life Assurance Co Ltd

Dated: 11 September 2014

Abbey Life Assurance Co Ltd  
100 Holdenhurst Road  
Bournemouth  
BH8 8AL