

Private and Confidential
Mr S Heath
254 Berglen Court
7 Branch Road
Limehouse
London
E14 7JZ

1 July 2021

Any questions?

You can call us on

Tel: 0800 056 3432

Fax: 0845 304 1122

Monday–Friday 8am to 6pm

We may record or monitor your call

Or you can email us:

pensr70@aviva.com

Dear Mr Heath

Request to transfer your policy

Thank you for your recent request. We recommend you seek financial advice from a regulated financial adviser before you make your decision.

We've enclosed the forms that we'll need to transfer your plan. Alternatively, the transfer can be requested through the Origo Options system. To see if this is possible, please speak to the provider you're thinking of transferring the benefits to.

Plan number

30773541AR

Plan holder

Mr Stephen Heath

1 - Request to Transfer an Aviva Personal Pension Plan form

- **You must complete this form.** It's important you check all the details to make sure they're correct. If any details need amending, please do this clearly and initial any changes.
- Please provide proof for any information you amend e.g. marriage certificate for change of name or recent utility bill for change of address.

Your fund value on

30 June 2021 was:

£5,499.10

Remember fund values can go down as well as up.

2 - Pension Transfer Out form

- **This form must be completed by your chosen Pension Scheme.** Please don't complete this yourself. It's important they provide us with all the information requested on the form.
- If you send your completed form to them as well they can return both forms to us.
- We also need to see the receiving scheme's HM Revenue & Customs scheme approval letter.

Enclosed

- Pension scam leaflet
- Request to transfer an Aviva Personal Pension Plan form
- Pension transfer out form

How long will it take to transfer my policy?

Once we've received all of the information we need, the transfer will normally take place within 5 working days.

If you've not heard from us after 15 working days from the date you sent the forms to your scheme provider, we'd suggest you contact them first to check if they've sent us all the information.

Aviva Customer Retirement Centre
PO Box 520
Norwich
NR1 3WG

Be aware of pension scams

Most pension transfers are problem-free. However, there are a number of companies currently in the marketplace who are seeking to encourage pension holders to access their pension funds before age 55 or transfer their money to unregulated investments – also known as 'pension scams'.

We've enclosed leaflets produced by The Pensions Regulator and the Financial Conduct Authority designed to give you some important information about the potential risks to your pension fund from pension scams.

We're here to help

If you have any questions, please call us on 0800 056 3432.

Yours sincerely

The Aviva customer team

REQUEST TO TRANSFER AN AVIVA PERSONAL PENSION PLAN

To the Scheme Administrator of the Aviva Personal Pension Scheme Series N

Full Name of Policyholder	Policy Number
Mr Stephen Heath	30773541AR

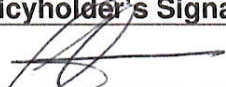
Address 254 Berglen Court 7 Branch Road Limehouse London E14 7JZ
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Date of Valuation	Total Transfer Value (which may fall or rise before the date on which transfer is completed)
30 June 2021	£5,499.10

I wish to transfer the above numbered policy to another pension provider and therefore request that you make a Direct Credit payment for the current bid value. The payment should be made to:

(Please insert name and address of the new provider) RC Administration Ltd 1A Park Lane, Poynton Stockport cheshire SK12 1RD
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I exercise this option in accordance with the Scheme Documents and agree that payment of the sum described above by Aviva will discharge Aviva from it's obligation to make any further payments in respect of the plan. Any payment does not discharge Aviva for any act/error in dealing with the plan.

Policyholder's Signature	Date
	4/7/21

PENSION TRANSFER OUT FORM

THE TRUSTEE OR ADMINISTRATOR OF THE RECEIVING SCHEME MUST
COMPLETE BOXES 3, 4 AND 5 IF THE TRANSFER IS TO PROCEED

Full Name of Policyholder	Policy Number
Mr Stephen Heath	30773541AR

1. Information about the ceding Scheme

Name	Aviva Personal Pension Scheme Series N
Registration	The scheme is registered under Chapter 2 of Part 4 of the Finance Act 2004
Reference number	00605650RK

2. Information about the transfer

Values are not guaranteed and may fall or rise before the transfer proceeds
Total transfer value (T/V): £5,499.10
There are no exit penalties.
There are no guaranteed benefits.
There are no valuable benefits.
This transfer is not subject to a Pension Sharing Order.
This transfer is not subject to an Attachment Order.

3. Account details into which Direct Credit is to be paid

Account Name to be credited:	Joel 2 vs 25-27 Pension Scheme
Account Number:	04919088
Sort Code:	23-83-96

Allied Irish Bank (GB)
Vantage Point, Hardman St
Manchester M3 3PL

THE TRUSTEE OR ADMINISTRATOR OF THE RECEIVING SCHEME MUST
COMPLETE BOXES 3, 4 AND 5 IF THE TRANSFER IS TO PROCEED

4. Information about the receiving scheme

Name of Scheme: Joel 2 vs 25-27 Pension Scheme
Pension Scheme Tax Reference / PSO number: 20003485RA

5. Declaration by the receiving scheme

I confirm that the receiving scheme is a UK scheme registered under Chapter 2 of Part 4 of the Finance Act 2004.

I confirm that the information given above about the receiving scheme is correct and I am willing to accept the transfer value (and any further payments made to Aviva by NICO in respect of this policy)

Name

Signature

Date

Address Stamp

Full Name of Policyholder

Mr Stephen Heath

Policy Number

30773541AR
