

J. PIETRUSZKA

Principal

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INVESTMENT MARKETING

SEE ENCLOSED, WITH

REFERENCE TO THE JOVAL DAIRY RELIEF  
SCHEME,

HAWKS

With Compliments

Authorised and Regulated by the  
Financial Conduct Authority  
Ref. 402391  
Data Protection Number: Z5167906

Your  
Personal Pension Scheme  
Transfer Declaration

SCOTTISH WIDOWS

Guidance Notes

The member should complete section 1 only. Sections 2 & 3 will be completed by the receiving scheme.

1 Member details

Your Title Mr ☐ Mrs ☒ Miss ☐ Ms ☐ Other title ☐

Name of Company receiving arrangement

Your last name

INGLIS

Address of Company receiving arrangement

Your first name(s)

VALERIE

Your daytime contact number

01479 831 127

Postcode

Policy number(s) to be transferred to new arrangement

611569688

I request the Trustees of the Scottish Widows Personal Pension Scheme to pay a transfer value to the Trustees of the Scheme/Insurance Company named above. I understand that payment of this transfer value will discharge the Trustees of the Scottish Widows Personal Pension Scheme of all liability whatsoever.

Member's signature

*Valerie Inglis*

Date

9-9-2014

2 Receiving Scheme details

The receiving scheme must complete Section 2 and Section 3.

The Receiving Arrangement is a Registered Pension Scheme, as defined in part 4 of the Finance Act 2004 under Pension Scheme Tax Reference (PSTR) number:

The cheque for the transfer value will be paid into an account in the name of the Trustees or Managers of the receiving arrangement and should be drawn in the favour of:

OR

The Receiving Arrangement is a Qualifying Recognised Overseas Pension Scheme (QROPS)\*, as defined in part 4 of the Finance Act 2004

\* ☐ If this box is ticked we will send you further documents to enable this to proceed

3 All Receiving Schemes

We confirm that:

The above statements are true and complete:

Name

Title

Signature

Date

For and behalf of the receiving arrangement

We agree to accept the transfer value from Scottish Widows plc.