



ST. JAMES'S PLACE
WEALTH MANAGEMENT

Administration Centre, PO Box 9034, Chelmsford, CM99 2XA
Telephone: 0800 027 1031 www.sjp.co.uk

Mrs B E Kneafsey
Liskeveen House
Moor End Road
Halifax
West Yorkshire
HX2 0RX

29B / 000051
99900* / 00032

14 April 2021

Dear Mrs Kneafsey

Retirement Account RA24159089

We have received a request from your St. James's Place Partner's office to provide you with the paperwork to allow you to transfer the above Account.

The current transfer value for crystallised benefits is £52,498.18 and is based on the current unit prices which are not guaranteed. The actual sum payable will be calculated using the unit prices on the working day after we receive all the required documentation.

If you wish to transfer benefits, you should complete the enclosed claim form and Lifetime Allowance check form (Open Market Option requests only). The Transfer Value Information Form needs to be completed by the receiving scheme administrators and sent to us with their bank details.

If you have any questions, please contact your St. James's Place Partner, Mark Timmins Wealth Management Ltd, or our Client Services team on 0800 027 1031.

Yours sincerely

Jared Whitehouse
Client Services Director



To help us improve our level of service, telephone calls handled by our Administration Centre may be recorded to help identify training issues and needs. St. James's Place UK plc (SJPUK) and St. James's Place Investment Administration Limited (SJPIA) are members of the St. James's Place Wealth Management Group. SJPUK is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. SJPIA is authorised and regulated by the Financial Conduct Authority. SJPUK and SJPIA Registered Office: St. James's Place House, 1 Tetbury Road, Cirencester, Gloucestershire, GL7 1FP, United Kingdom. Registered in England with number 2628062 for SJPUK and 08764231 for SJPIA.