



**Receiving Scheme/Policy Declaration  
(TRANSFER VALUE INFORMATION FORM)**

Please tick one	<input checked="" type="checkbox"/>	
Pension transfer	<input checked="" type="checkbox"/>	To be completed by the receiving scheme trustees or administrator

Open market option	<input type="checkbox"/>	To be completed by the annuity provider
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Name of transferring scheme/arrangement:	Retirement Account
Policy/Reference Number:	RA24159089
Member's Name:	Beverley Ellen Kneafsey
National Insurance Number:	NH757370C
Member's date of birth:	09-02-1966
The transferring scheme is a UK Registered Pension Scheme	

Name of receiving scheme and provider:	Kennedy Kneafsey SSAS / RC Administration Ltd
Reference(to be used on correspondence and payments):	B Kneafsey
HMRC reference number:	20002731RZ
Date of scheme registration:	1 April 2020
<b>If the Scheme has been registered within the last 24 months a copy of your HMRC approval letter must be provided</b>	
Payment details	
<del>Cheque</del> made payable to: <b>Please arrange a bank transfer instead</b>	
Address: Allied Irish Bank (GB) Four Hardman Street, Spinningfields, Manchester, M3, 3PL	Account Name: Kennedy Kneafsey SSAS Account Number: 04919088 Sort Code: 23-83-96
Reference to be included with payment (e.g. client name/policy number):	B Kneafsey

<b>PENSION TRANSFER (please do not complete for open market option)</b>	
1. We undertake that the receiving scheme is:	
	Please tick one <input checked="" type="checkbox"/>
A. Registered Defined Benefit Occupational Pension Scheme	<input type="checkbox"/>
B. Registered Defined Contribution Occupational Pension Scheme	<input checked="" type="checkbox"/>
C. Individual Personal Pension Scheme	<input type="checkbox"/>
D. (i) Qualifying Recognised Overseas Pension Scheme (QROPS)	<input type="checkbox"/>
D. (ii) Country under the law of which the scheme is established and regulated:	



<b>OPEN MARKET OPTION</b>
We confirm that the member's fund will be used to secure a non-assignable, non-commutable annuity.
1. We are/are not* able to accept business from a non UK scheme.
Please note that no pension commencement lump sum will be provided on receipt of the member's fund.
Address for correspondence:

<b>DECLARATION</b>	
<input checked="" type="checkbox"/>	Please tick and complete appropriate section
<input checked="" type="checkbox"/>	<b>Receiving Scheme Declaration</b> (for pension transfer)
<input type="checkbox"/>	a) We declare that the information given above and overleaf is true and correct. <input checked="" type="checkbox"/>
<input type="checkbox"/>	b) We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with HMRC conditions of approval. <input checked="" type="checkbox"/>
<input type="checkbox"/>	c) We confirm that the transfer payment will be applied to an arrangement which satisfies the requirements of Sections 169(1D) and (1E) of Finance Act 2004 and SI2006/499 (as amended) <input checked="" type="checkbox"/>
<input type="checkbox"/>	d) If a non UK scheme, we: - are registered as a QROPS have not been excluded from being a QROPS. - give our authority for HMRC to give information to you about our QROPS status, and; - confirm that the legislation of the country in which our scheme is established allows us to accept a transfer from a UK Approved pension scheme. <input type="checkbox"/>
<input type="checkbox"/>	<b>Annuity Provider's Declaration</b> (for open market option)
<input type="checkbox"/>	Where the fund originates from a trustee based pension scheme, the grantee of the policy will be the trustees of the purchasing scheme unless otherwise instructed.
Signature:	
Company name:	RC Administration Ltd
Position:	Director
Date:	