



St. James's Place
Request to Transfer

To St. James's Place

I, Mr Michael Gerard Kneafsey, hereby request you to pay the sum shown in the schedule below representing the whole sum due on the Account mentioned therein by a crossed cheque payable as indicated below. I understand any tax free cash protection from pre 6 April 2006 rights will be lost on transfer, unless this is part of a block transfer, or Primary / Enhanced Protection applies.

Account Number	Total Sum Payable
RA07201189	£200,171.90
Receiving Scheme :.....	Kennedy Kneafsey SSAS
Payee*/**.....	Kennedy Kneafsey SSAS
*For insured or partially insured schemes, the payment must be payable to the Insurer	
**For non – insured schemes, payment must be made payable to the	
Trustees of the <i>Company Name</i> Retirement Benefits Scheme	
Address of Payee	Office 12 Venture Wales Building
	Pentrebach
	Merthyr Tydfil
	CF48 4DR

DECLARATION – TO BE COMPLETED IN ALL CASES

Please pay the full proceeds of the above Account in accordance with the instructions above.
Settlement in terms of the instruction given will be full discharge of St. James's Place's liability for the benefits as described in this form.

Signed Date
(Mr Michael Gerard Kneafsey)

The value indicated is based on unit prices on 8 November 2019. The actual value will be based on prices on the date following receipt of all the required documentation (claim form and Transfer Value Information Form) fully completed at the St. James's Place Administration Centre.



**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:	RA07201189
Member's Name:	Michael Gerard Kneafsey
National Insurance Number:	NR011713A
Member's date of birth:	11-08-1968
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):	M Kneafsey
HMRC reference number:	20002731RZ
Date of scheme registration:	1 April 2020
If the Scheme has been registered within the last 24 months a copy of your HMRC approval letter must be provided	
Payment details	
Cheque made payable to: Please arrange a bank transfer instead	
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):	M Kneafsey

PENSION TRANSFER (please do not complete for open market option)	
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:	



OPEN MARKET OPTION
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:

DECLARATION	
<input checked="" type="checkbox"/>	Please tick and complete appropriate section
<input checked="" type="checkbox"/>	Receiving Scheme Declaration (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"/>	Annuity Provider's Declaration (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:	