

**Transfer Summary**

Client: Carl Glynn
Receiving Provider: Cranfords
Receiving Product Type: SSAS
Receiving Contract Reference: Kobbs of Kendal Ltd RBS
Ceding Contract Reference: F46024/20219
Ceding Product Type: IPP
Transaction Type: P2P
Transfer Creation Date: 09/09/2015
Transfer Status: Funds Received

Transfer Status

Status: Funds Received
Date Funds Received: 10/11/2015

Transfer Timeframe

Activation Date: 09/09/2015 12:58:39
Scheduled Completion Date: 21/09/2015
Expected Completion Date: 10/11/2015
Transfer Delay Reason: Additional checks required
Transfer Alert?: -

Notes

Case Notes: -
Transfer Notes: "We have no record of the
reduced money purchase annual
allowance having been triggered"
Friends Life 10/09/2015 09:17:44 Vishakha
Masure

Product Notes

Receiving Provider Product Note: -
Ceding Provider Product Note: -

Receiving Provider Contact Details

Contact: Toni Haynes
Email Address: transfers@cranfords.biz
Telephone Number: 0844 410 0037
Additional Information: -

Ceding Provider Contact Details

Contact: NGP (KA) Transfers
Email Address: corporate_retirements@friendsprovident.co.uk
Telephone Number: 03456029221
Additional Information: -

Receiving Contract Details

Type Of Transfer: Product Based
Receiving Provider Reference: Kobbs of Kendal Ltd RBS
Completed Application Received Date: 08/09/2015
Scheme Tax Reference Number: 00822543TY
Bank Account: Kobbs of Kendal Ltd RBS
Adviser Involved?: No

Ceding Contract Details

Transaction Type: P2P
Provider: Friends Life
Ceding Contract Reference: F46024/20219
Retirement Date: 18/04/2038
Pre-Retirement Benefits?: Yes
Pre-Retirement - Transfer All Funds?: Yes
Pre-Retirement - Approximate Value: 26,520.00
Drawdown to Drawdown Transfer?: No
Product Type: IPP

Scheme Tax Reference Number: 00605420RL

Client Details

Forename: Carl
Surname: Glynn
Date of Birth: 18/04/1973
National Insurance Number: NZ496951B
Receiving Provider Age Evidence Seen: No
Postal Code: LA9 5QE
Country: UNITED KINGDOM
Ceding Provider Age Evidence Seen: No

Allowance Details

Does Money Purchase Annual Allowance No
apply?:

Uncrystallised LTA% Used: -
Is client subject to a Reduced Lifetime No
Allowance?:

Protection Applies? (Enhanced, Primary, Fixed Unknown
Protected, Fixed Protection 2014, or Individual
Protection 2014):

Payment

Date Funds Sent: 05/11/2015
Payment Method: BACS
Payment Reference: Kobbs of Kendal Ltd RBS
Part of Larger Payment?: No
Total Transfer Amount: 25,914.07

BACS/TT Payment Details

Account Name: Kobbs of Kendal Ltd RBS
Account Number: 83002705
Sort Code: 205744
Roll Number: -
Additional Information: Special account to enable client bank accounts.

This is an individual client bank account

Cheque Payment Details

Payee: CHEQUE
Address Line 1: 1 The Pavilions
Address Line 2: Cranford Drive
Address Line 3: Knutsford Business Park
Address Line 4: Cheshire
Post Code: WA16 8ZR

