

SIPPDEAL E-SIPP TRANSFER DISCHARGE FORM

Arrangement: AJ Bell Investcentre
Member: Philip John Buckingham
Account Number: SCC721375

To be completed by the Member (Please complete all parts)

Reason for transferring?
(Please select all that apply)

Lower charges	<input type="checkbox"/>
Adviser recommendation	<input checked="" type="checkbox"/>
Consolidation	<input type="checkbox"/>
Greater flexibility	<input type="checkbox"/>
Other (please specify)	<input type="text"/>

Did you receive advice in relation this transfer? Yes / No (please circle)

If yes, from whom did you
receive advice?
(Please insert details)

Name
Address
Telephone number



How do you wish to transfer your assets? CASH only ☐
IN-SPECIE ☒

Amount of transfer? All of my fund ☒ or amount £ CIRCA £750,000 IN SPECIE ASSETS PLUS CIRCA £250,000 CASH

I hereby request you to transfer the amount specified above from the benefits to which I am entitled under the arrangement named above, and pay the transfer value to the receiving scheme stated below.

I declare that I am legally entitled to the benefits in question, which the arrangement secures. I agree that payment by you in accordance with these instructions will fully discharge A J Bell Management Limited and Sippdeal Trustees Limited from liability to provide benefits for me under the above arrangement, and I indemnify you against all claims or proceedings made against you in respect of the benefits to be transferred, and against all resulting losses and expenses, which you may incur.

I confirm that neither myself nor any party connected with me will be in receipt of any payment as a result of this transfer and its subsequent investment other than authorised pension and lump sum benefits, payable to me no earlier than from age 55.

Signed by the member in his/her capacity as member to the arrangement:

Phil Beggs

Dated 15.12.2014

To be completed by the receiving scheme

Arrangement:
Member:
Account Number:

I/We agree to accept the transfer payment from the above arrangement and confirm the receiving scheme is a registered pension scheme under Finance Act 2004.

Full name of receiving scheme	LUCY BEE SSAS								
HMRC pension scheme tax reference	00817608RN								
Scheme administrator's name:	PENSION PRACTITIONER.COM LIMITED								
Address:	DAWS HOUSE 33-35 DAWS LANE LONDON NW7 4SD								
Telephone number	0800 634 4862								
Type of scheme (please select)	<table border="1"> <tr> <td>Occupational Scheme / SSAS</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Occupational Scheme / non SSAS</td> <td><input type="checkbox"/></td> </tr> <tr> <td>SIPP / Personal Pension</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Other (please state)</td> <td><input type="text"/></td> </tr> </table>	Occupational Scheme / SSAS	<input checked="" type="checkbox"/>	Occupational Scheme / non SSAS	<input type="checkbox"/>	SIPP / Personal Pension	<input type="checkbox"/>	Other (please state)	<input type="text"/>
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Occupational Scheme / non SSAS	<input type="checkbox"/>								
SIPP / Personal Pension	<input type="checkbox"/>								
Other (please state)	<input type="text"/>								

Please complete this section if type of Scheme is an Occupational Scheme

Pensions regulator reference number	N/A (ONE MEMBER SCHEME)
Sponsoring employer(s) name(s)	LUCY BEE LIMITED
Company number(s)	0794 9199
Company registered address	AMWELL HOUSE 19 AMWELL STREET HODDESDON HERTS EN11 8TS
Employer relationship with member?	EMPLOYER / EMPLOYEE
Is the member also a Trustee? (If yes, please provide a copy of the deed of appointment)	YES
What is the name of the regulated investment service provider for the Scheme?	MARK BEGG ASSET MANAGEMENT LTD
FCA number for regulated investment service provider named above	221308

Please complete this section if type of Scheme is a Personal Pension, SIPP or Other

Scheme operators name	
Operators address	
FCA number	

Scheme administrator bank details

The transfer payment will be paid directly to the Scheme Administrator's bank (please note that it is not possible to issue a cheque).

For security purposes we may call to confirm the bank account details:

Bank name:

METRO BANK

Account name:

LUCY BEE SSAS

Account number:

Sort code:

23-05-80

The reference to be quoted

SIPP DEAL TRANSFER

If the client has requested an in-specie transfer, can you please complete the following: -

Stockbroker Details

Name of stockbroker:

JAMES BREARLEY & SONS

Address:


PO Box 34, WALPOLE HOUSE,
UNIT 2, BURTON ROAD, BLACKPOOL. FY4 4WX

Telephone number:

01253 831100

Account no / Reference

TO FOLLOW ONCE ACC. OPEN.

Signed: 
(Authorised signatory of the receiving scheme)

Dated 29 DECEMBER 2014

Position: SCHEME ADMINISTRATOR