



Mr S P Wormull
Hunyani
Harborough
Pulborough
West Sussex
RH20 2PN

1 October 2015

Dear Mr Wormull

Transfer of your plan

Thank you for sending us back the discharge form, unfortunately we are unable to accept this.

To confirm we require:

- Part A to be completed by yourself
- Part B to be completed by the scheme administrators.
- Cover letter from the scheme administrators which includes confirmation that the receiving scheme can accept crystallised money from your plan, as stated in our previous letter.

On receipt of the satisfactorily completed discharge we will be able to proceed with your transfer. It is expected that the money will be in the Scheme account within 3-4 working days of receipt of the completed discharge form.

We're here to help

If you have any questions, please call us on 0800 158 3474.

Yours sincerely

Nicola Oldale
Customer Adviser

Any questions?

You can contact us on

Tel: 0800 158 3474

Fax: 01603 878725

We are open Monday to
Friday 9am to 5pm

We may record or monitor your call

Our reference is
P/PP/PPP/NLO

Visit our website at
aviva.co.uk

Crystallised Pension Plan

Plan number
8173011UD

Enclosed

- Copy of previous letter
- Transfer discharge form
- Postage paid envelope

1003

CRYSTALLISED PENSION PLAN TRANSFER DISCHARGE FORM

Return to: Aviva, PO Box 520, Norwich, NR1 3WG



Part A - To be completed by the planholder

Plan number: 8173011UD

Planholder's name: STEPHEN PETER WORMULL

Current address: HUNYANI, HARBOROUGH DRIVE
WEST CHILTINGTON W. SUSSEX Post code: RH20 2PN

To help speed up the transfer payment we might need to contact you for more information. If you are happy for us to do this by phone please advise your contact phone number below. We might also call you to get your views on our service.

Contact phone number: 01798 815119

Please cancel the above numbered plan and transfer the benefits accrued to or in respect of me to the scheme detailed in part B of this discharge. I agree that on release of the transfer payment to the scheme detailed in part B of this form, Aviva is discharged from its obligation to make any further payments in respect of the plan. Any payment does not discharge Aviva for any act/error in dealing with the plan.

I accept that my request to transfer the benefits accrued to or in respect of me to the plan is subject to the agreement of the scheme administrator in relation to this plan.

Signature: [Signature] Date: 6/10/15

Part B - To be completed by the administrator of the receiving scheme

Please note – transfers of personal crystallised pension plans can be requested through Origo Options.

Name of scheme:
If transferring to another Aviva plan, please also show the plan number.

Administrator:

Address:

Post code:

Type of scheme

☐ Personal scheme registered as a UK Pension Scheme under Part 4 of the Finance Act 2004

Pension scheme tax reference number: ASCON:

☐ Occupational scheme registered as a UK Pension Scheme under Part 4 of the Finance Act 2004

Pension scheme tax reference number:

ESCON: SCON:

Payee name for transfer payment by cheque:

Bank details for transfer payment by BACS (Payment can only be to another insurer or pension scheme account)

Sort code: 20-98-44 Account number: 93146413

Account name: MEAD HOUSE LIMITED PENSION SCHEME

Reference:

Bank name, address and post code: BARCLAYS STORRINGTON RH20 4NG

Mr S P Wormull
Hunyani
Harborough Drive
Pulborough
West Sussex
RH20 2PN

1 October 2015

Dear Mr Wormull

Thank you for getting in touch with us

I write further to your letter of 15 September 2015 and your conversation with Debbie Moore on 18 September 2015.

Debbie has advised you we have received a satisfactory response from HMRC re the registration status of The Mead House Limited Pension Scheme, as such we are able to proceed with your transfer.

As it has been some time since we received your instructions to transfer, I consider it would be prudent to ask you and the Receiving Scheme Administrator to complete the enclosed discharge form confirming the current bank account for the Scheme and to confirm that the Scheme Administrator of the Scheme is able to accept crystallised money from your plan. I have discussed this with Debbie and we have agreed the completion of the discharge would be the simplest way of confirming this information.

I enclose the discharge for completion.

On receipt of the satisfactorily completed discharge we will be able to proceed with your transfer. It is expected that the money will be in the Scheme account within 3-4 working days of receipt of the completed discharge form.

It's important you continue to consider all the options available before making any decisions. We recommend you speak to a financial adviser or seek free, impartial guidance from the government at pensionwise.gov.uk.

Any questions?

You can contact us on

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Fax: 01603 878725

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Crystallised Pension Plan

Plan number

8173011UD

Your estimated fund value
is **£34,836.85**

Remember fund values can
go down as well as up.

Enclosed

- 'Pension Wise' letter
- Plan statement
- Transfer discharge form
- Postage paid envelope

We're here to help

Please contact us if you've any questions but, remember, we can only provide information and not advice.

Yours sincerely

Nicola Oldale

Customer Adviser

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