

Brad posted to AVIVA in  
envelope they  
provided.  
(Not Registered post)

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com www.pensionpractitioner.com

Transfer Out Section  
Nicola Oldale  
Aviva  
PO Box 520  
Norwich  
NR1 3WG

**First Class Recorded Delivery**

19 October 2015

Dear Nicola,

**Transfer in to Mead House Limited Pension Scheme**

**Name: Mr. Stephen Peter Wormull**  
**Date of Birth: 25 April 1954**  
**Policy Number: 8173011UB**

I refer to your letter dated 01 October 2015.

Please find Part A and Part B enclosed and duly completed and signed as requested.

We confirm that Mead House Limited Pension Scheme can accept the crystallised money from the above plan.

I trust that the transfer can be concluded.

The transfer payment should be made by **BACS** to the Trustees pension scheme bank account as detailed on the forms.

Thank you in advance of your assistance

Yours sincerely



Brad Davis  
For Pension Practitioner .Com

Enc

# 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: MEAD HOUSE LIMITED PENSION SCHEME

If transferring to another Aviva plan, please also show the plan number.

Administrator: PENSION PRACTITIONER.COM

Address: DAW'S HOUSE, 33-35 DAW'S LANE,

LONDON

Post code: NW7 4SD

Type of scheme

☐ Personal scheme

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

Pension scheme tax reference number: N/A

ASCON: N/A

☒ Occupational scheme

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

Pension scheme tax reference number: 00023168RJ

ESCON: N/A

SCON: N/A

Payee name for transfer payment by cheque: N/A

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

Sort code: 20-98-54

Account number: 93146413

Account name: MEAD HOUSE LIMITED PENSION SCHEME

Reference: AVIVA TRANSFER

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

Members of the Association of British Insurers

Aviva Life & Pensions UK Limited. Registered in England No 3253947. 2 Rougier Street, York, YO90 1UU.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm Reference Number 185896.





Mr S P Wormull  
Hunyani  
Harbrough  
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

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](http://pensionwise.gov.uk).

### Any questions?

You can contact us on

**Tel: 0800 158 3474**

**Fax: 01603 878725**

We are open 9am to 5pm  
Monday to Friday

We may record or monitor your call

### 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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