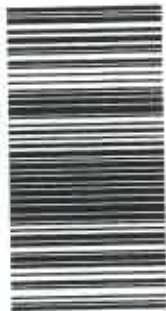
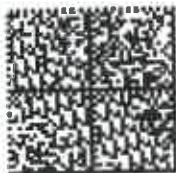


Special Delivery Guaranteed by 1pm



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Account
Postage GB
AC0599290003



Return Address
St. James's Place,
Administration Centre,
PO Box 9034,
CHELMSFORD,
CM99 2XA

Carlton James Pension Administration
Lime Kiln House
Lime Kiln
Royal Wootton Bassett
SN4 7HF

31 March 2023

Dear Sir / Madam

Policy / Reference Number: 09736008

Account Owner: Mr Robert Smith

The above client wishes to transfer their benefits from your arrangement to the St James's Place Personal Retirement Plan. This is a UK Registered Pension Scheme which was formerly approved as an Appropriate Personal Pension Scheme. The Pension Scheme Tax Reference number is 00616190RZ and its ASCN is A7001200H.

Please arrange for the payment to be sent to us by BACS to the following details:
Account Name: St James's Place UK Plc, Sort code: 20-13-42, Account No: 50642371

If payment by BACS is not appropriate please send a cheque payable to St. James's Place UK plc.

Any correspondence should be sent to:

St. James's Place UK plc
Administration Centre
PO Box 9034
Chelmsford
CM99 2XA

When sending the payment please quote **ARND114802051**

If you need any further information please call us on 0800 027 1030 or email us at NBS@sjpadmin.co.uk quoting the above number.

Yours faithfully



Customer Service Executive- St. James's Place UK Plc



CARLTON JAMES

Receiving Scheme Declaration Form

Section 1

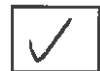
Member Name

Robert Smith

Section 2

We undertake that the receiving Scheme is:

- A UK Registered Scheme:



This is a scheme which is registered by HM Revenue & Customs under Part 4 of the Finance Act 2004 (including existing scheme that automatically acquire this new registered status on 6h April 2006). The Scheme PSTR/SF Number Is (Delete as Appropriate):

00616190R2

- Type of scheme:



A registered personal pension scheme



A Small Self Administered Scheme (SSAS)



Self invested personal pension (SIPP)



Occupational defined contribution

- A Qualifying Recognised Overseas Scheme:



For a scheme to hold 'Qualifying' Status it must evidence that:

You have achieved a letter of acceptance from a HMRC Audit and the Pension Scheme Services to confirming your registered status as a Qualifying Recognised Overseas Scheme.

Carlton James may be unable to assist in a request for the transfer of benefits to another type of scheme.

Please make sure this form is filled in, signed and dated. Once the receiving scheme declaration and supporting documentation have been evidenced and satisfies our due diligence, payment will be made via BACS. If you're unable to accept BACS please notify us at your earliest convenience.

Section 3:

New Provider Details:

Scheme Name:

ST.JAMES'S PLACE PERSONAL RETIREMENT PLAN

Reference Number: (If Known)

ARNR 114802051

Bank Name:

BARCLAYS

Account Holder Name:

ST. JAMES'S PLACE UK PLC

Account Number:

50642371

Sort Code:

20-13-42

BACS Payment Reference:
(If applicable)

ARNR 114802051

Declaration

I/We confirm that the information given in this 'Receiving Scheme Declaration Form' is accurate to the best of my/our knowledge and belief.

Signed for and on behalf of the receiving
scheme:

Dated:

Ewa Cooper

31.03.2023

Print Name:

Position:

EWA COOPER

LEAD ASSOCIATE



Managing pension schemes

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St. James's Place Personal Retirement Plan's information

What is the name of the scheme?	St. James's Place Personal Retirement Pl an
--	---

What type of scheme is St. James's Place Personal Retirement Pl an?	Other
--	-------

Which country was St. James's Place Personal Retirement Pl an established in?	United Kingdom
--	----------------

[Return to St. James's Place Personal Retirement Pl an](#)

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St. James's Place Personal Retirement Plan

Accounting for Tax returns

[Start a new AFT return](#)

[View or change past AFT returns](#)

Payments and charges

Total of outstanding payments

£0.00

[View your financial overview](#)

[View all payments and charges](#)

Pension scheme details

Pension Scheme Tax Reference:
00616190RZ

Registration for Tax:
5 April 2006

[View or change the registered scheme details](#)

Pension scheme administrators

Added on 5 April 2006:
ST JAMES'S PLACE UK PLC

[Invite a scheme administrator](#)

[View or remove a scheme administrator](#)



Managing pension schemes

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Your pension schemes

If you want to view a pension scheme that you did not register through this service, you must use the Pension Schemes Online service.

Scheme name	SRN	PSTR	Status
St.James's Place Additional Retirement Plan		00639237RB	Open
St. James's Place Personal Retirement Plan		00616190RZ	Open

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