

4 Exchange Quay Salford Quays Manchester M5 3EE

Strictly Private & Confidential

Pension Practitioner 48 Chorley New Road Bolton BL1 4AP **(**0345 83 99 060 **(**0345 83 99 061 **(**∞) enquiry@investcentre.co.uk

www.investcentre.co.uk

19 December 2019

Dear Sirs

#### AJ Bell Investcentre SIPP - Steven Anthony Collier - SCC837105 / 207990 Transferring Scheme: Pension Practitioner - WL941057A

Mr Collier has requested for the existing pension plan held with Pension Practitioner to be transferred to the SIPP administered by us, AJ Bell Management Limited. Please find enclosed our Transfer Form, completed and signed accordingly.

Please ensure the funds are sent via electronic payment to the following bank details:

Bank: Bank of Scotland, New Uberior House, 11 Earl Grey Street, Edinburgh, EH3 9BN

**Sort Code:** 12-27-34 **Account Number:** 06980213

Account Name: Sippdeal Trustees Ltd Payments In

Payment Ref: SCC837105

Upon completion of the transfer, in order to prevent any delay in allocating the funds to the client's SIPP, I would be grateful if you could send us the full transfer information as soon as. This should confirm the following:

- The transferring scheme's HMRC Pension Scheme Tax Reference number.
- The total transfer value.
- Whether the transfer contains any crystallised benefits, along with the relevant details.
- Details of any transitional protection relating to the transferring benefits and/or member.
- Whether the transfer is part of a block transfer.
- Whether the transfer value derives from a Pension Sharing Order or Provision.
- Details of any Earmarking Orders in force against the transferring benefits.
- If the member is subject to the Money Purchase Annual Allowance.

We only provide pension benefits as a drawdown pension received by way of a recognised transfer. We are not an annuity provider and cannot accept Open Market Option payments. The transfer paperwork has been completed on that basis. Also, we do not accept transfers from non-UK registered pension schemes. If the ceding scheme is not a UK registered pension scheme as determined by HMRC, the transfer cannot proceed. We reserve the right to return any funds received as an Open Market Option or from a non-UK registered pension scheme.

Please note, in 2014 the Sippcentre SIPP was rebranded to the AJ Bell Investcentre SIPP. There was no change to the underlying legal ownership or to the administrators of the SIPP and a copy of the Resolution confirming this change of name can be provided upon request.

For the sake of clarity, the SIPP falls under, and is governed by, the rules of the Sippdeal e-sipp. The Master Trust Deed and Rules for the Sippdeal e-sipp confirm that AJ Bell Management Limited (company number 03948391) acts as the Scheme Administrator, and that Sippdeal Trustees Limited (company number 4050222) act as the Scheme Trustee. AJ Bell Management Limited are

appropriately authorised by the FCA under firm reference number 211468. You may wish to check the Financial Services Register for confirmation of this.

The Sippdeal e-sipp is a registered pension scheme with HMRC under part 4 of the Finance Act 2004 and the Pension Scheme Tax Reference number is 00605674RH. A copy of our HMRC approval letter is enclosed.

I look forward to receiving the transfer payment at your earliest convenience.

If you have any questions, please contact the transfers team at transfersin@investcentre.co.uk.

Yours sincerely

**Dean Grindrod** 

**Transfers Administrator** 

Enc. Transfer Form, HMRC approval letter



### SIPP cash transfer form

RECEIVED

This form is your authority to transfer benefits from another registered pension scheme into an Ad-Bell Investcentre SIPP via a cash payment. If you would like to transfer benefits in specie, please use the SIPP in specie transfer form. Both forms may also be used for a Junior SIPP. All transfer forms are supplementary to your application form.

If you would like a copy of this, or any other item of our literature, in large print, Braile Galuwa fargest entact us on 0345 83 99 060 or email us at enquiry@investcentre.co.uk.

You must complete all of the details requested on the following page and sign the declaration. Once completed, please return the form to AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE.

## To be completed by the transferring client

10000000000000	ou by the transfer many
Personal informati	on
Full name of adviser	PETER JACQUET
Name of adviser firm	PILLING & CO STOCKBROKERS LTD.
Full name of client	STEVEN ANTHONY COLLIER
Date of birth	18+L DEZ 1960 Your SIPP reference (if known) SCC 837105
National Insurance Nu	mber WL941057A
Permanent residential	address 33 WYATT AVENUE
	SHEFFIELD
Postcode	SII 9FN Country U.K.
Policy number  Pension Scheme Tax R  Name and address of a	NOEL VILLAGE (STEELFOUNDER) LTD RBS SSAS  I/A  Reference (PSTR) OC 417495 RA  administrator of transferring scheme PENSIAN PRACTIONER,  LEY NEW ROAD BOLTON
	Postcode BLI 4AA
Telephone number of	
Approximate fund valu	ue to be paid to the receiving scheme £ 180,000 — 00
Is the transferring sche	eme a final salary pension scheme?
value guarantee is less th	that if you are transferring benefits from a final salary pension scheme and the expiry date of any transfer nan 10 working days away, then whilst we will do our very best, we cannot be held responsible if the deadline is to keep in regular contact with the transfering scheme to check on progress.
This is a full transfer.	This is a partial transfer If partial, please enter the total fund value £ Zo7k APPROX

# (dia) HM Revenue & Customs

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- Sign out

User Name: (A0051780) PSTR 00605674RH

## **Pension Schemes**

### Your HMRC Services

- Pension Schemes
  - >Welcome
  - >View messages
  - >View all Pension Schemes
  - >Advanced Scheme Search
  - >Registered Pension Schemes Manual
- Registration
  - >View Certificate
  - >View Registration Details
- Scheme Administration
  - > View Current Scheme Details
  - >Amend Scheme Details
  - >Scheme Administrator Management
  - >Practitioner Management
  - >View Submission Receipts
- · Pension Service Notices for Scheme
  - >View Notices
- Reporting
  - >Event Report
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  - >Pension Scheme Return
- Quick Links
  - >The Pensions Regulator
  - >VAT
  - >Your Online Services
  - >Make a Payment
  - >Sign out

### Pension Scheme Summary

Pension Scheme Name The Sippdeal e-sipp Pension Scheme Tax 00605674RH Reference (PSTR)

- > View current scheme details
- > Amend scheme details

Reporting 🚱

Registration 🚱

Please select the type of report below:

Registration for

05 Apr 2006View

> Accounting for Tax

Tax Relief at source

04 Feb 2008 ViewAmend > Registered Pension Scheme Return

> Event Report

Scheme Administration

Pension Service Notices for Scheme

Please select an option below:

You have 55 notices for this Pension

Scheme

> Scheme Administrator management > View notices

> Practitioner management

> View submission receipts

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Current scheme details			
Pension Scheme Name	The Sippdeal e-sipp		
Deferred annuity contract / Retirement No annuity contract made after 5 April 2006			
Date scheme registered	05 Apr 2006		
Name of Scheme Administrator who registered the scheme	A J Bell Management Limited		
Scheme status	Open		
Sub-scheme	No		
Pension scheme structure	Single		
The scheme is an investment regulated Yes			
pension scheme 🚱			
Band of number of scheme members	10001+		
Registered for Relief at source	Yes		
Occupational pension scheme 2	No		
Country or Territory scheme established	UNKNOWN		