



OLD MUTUAL
WEALTH

Pension Practitioner
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

Dear Sir/Madam

Client Name: Mr Jake Robbins

We write with reference to a recent request we have received from the above client, to transfer away to a scheme administered by your office.

To enable us to assist with the transfer of this policy, we would be grateful if you could please provide the following information in regard to The Orchestrated Media Pension Scheme.

A copy of the Scheme Rules
A copy of the Establishing Deed
A copy of The Pension Regulator's registration certificate
A copy of the HMRC Certificate
A copy of scheme T&C's / Key Features Document
Confirmation of whether the scheme is an Occupational Pension Scheme
A copy of the Key Features document or members booklet for the Scheme
Details of the sponsoring employer
Details of the member's employment with the sponsoring employer of the Establishing Scheme
Details of the investment service providers the scheme is linked to
Confirmation as to whether or not you carry out due diligence on investments to protect members from investment fraud
Written authorisation that Old Mutual Wealth can contact HMRC in relation to The Orchestrated Media Pension Scheme.

Please note that there will be a delay in processing the transfer request while we are carrying out these additional checks. In light of this, we would be grateful if you could provide all the information requested, in writing as soon as possible.

We will also be contacting the client to make them aware of the possible delays involved in processing the transfer.

If you have any questions about this letter, please contact us using the details shown.

Yours sincerely

Mark Hibbitt

4 October 2019

Call us
Customer Contact Centre
Freephone: 0808 171 2626

Open Mon – Fri 8.00am to 7.00pm

Email us
ask@omwealth.com

Write to us
Old Mutual Wealth
Old Mutual House
Portland Terrace
Southampton
SO14 7AY

Visit our website
www.oldmutualwealth.co.uk

What to do next

- Let us or your adviser know if you have any questions about this letter

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Old Mutual Wealth provides you with access to its investment platform. Within this platform you can open an ISA and Collective Investment Account provided by Old Mutual Wealth Limited and a Collective Retirement Account and Collective Investment Bond provided by Old Mutual Wealth Life & Pensions Limited.

Old Mutual Wealth Limited and Old Mutual Wealth Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively. Registered Office at Old Mutual House, Portland Terrace, Southampton SO14 7EJ, United Kingdom.

Old Mutual Wealth Limited is authorised and regulated by the Financial Conduct Authority. Old Mutual Wealth Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Their Financial Services register numbers are 165359 and 207977 respectively. VAT number 386 1301 59.