

Transfer Out Section
The Barclays Bank UK Retirement Fund
Towers Watson
PO Box 709
Redhill
RH1 9EG

Sent By Next Day Guaranteed Delivery

10 June 2013

Dear Sirs,

Member: Paul Tiernan Dolan

National Insurance Number: NB914670C

Date of Birth: 15 May 1964

Scheme Name: The Barclays Bank UK Retirement Fund (the UKRF)

Reference Number: 0346152

Please find enclosed your Transfer Discharge Forms duly completed and signed. I also attach the HMRC Tax Registration Letter, HMRC Registration Certificate, client's certified Passport to confirm his date of birth and a certified Utility Bill to verify the client's home address.

The page signed by the client verifying his date of birth is being sent to you directly by the client under separate cover.

The payment should be made by BACS to the following account details:-

Name of bank: Bank of Scotland

Account name: P T Dolan Retirement Benefit Scheme

Account number: 10079061

Sort code: 12-20-26

If you require any further documentation to be completed in order that the transfer can be concluded, please let me know.

Please acknowledge safe receipt and that the documentation is all in order.

Thank you for your assistance in this matter.

Yours faithfully



Brad Davis

For Pension Practitioner .Com

Enc

The Barclays Bank UK Retirement Fund (the UKRF)
The 1964 Pension Scheme

Transfer-out scheme authority form

Name of the member: Mr PT Dolan
Reference number: 0346152

On behalf of the trustees or scheme administrator of the following arrangement, we give you permission to ask HM Revenue & Customs for any information about the arrangement's registration status.

Name of arrangement: PT DOLAN
RETIREMENT BENEFIT SCHEME
Address and post code: GREENCHASE LTD
SUITE 349 CANTERBURY COURT
KENNINGTON BUSINESS CENTRE
13 BRIXTON ROAD, LONDON
DD 799 557 RR
Pension scheme tax reference (PSTR)/QROPS number:
Employer contracting-out number: N/A
Scheme contracting-out number: N/A

Signature:



Date:

14/5/2013

Print name:

PAUL DOLAN

Please return the filled-in form to:

The Barclays Bank UK Retirement Fund
PO Box 709
Redhill
RH1 9EG
UK

BCL/0346152/1710864

STATEMENT FOR SELF-CERTIFIED SOPHISTICATED INVESTORS

The statement to be signed for the purposes of article 50A(1) (definition of self-certified sophisticated investor) must be in the following form and contain the following content—

“Statement for Self-Certified Sophisticated Investor

I declare that I am a self-certified sophisticated investor for the purposes of the Financial Services Markets Act (Financial Promotions) Order 2005.

I understand that this means:

- (a) I can receive financial promotions that may not have been approved by a person authorised by the Financial Services Authority;
- (b) the content of such financial promotions may not conform to rules issued by the Financial Services Authority;
- (c) **by signing this statement I may lose significant rights;**
- (d) I may have no right to complain to either of the following –
 - (i) the Financial Services Authority; or
 - (ii) the Financial Ombudsman Scheme;
- (e) I may have no right to seek compensation from the Financial Services Compensation Scheme.

I am a self-certified sophisticated investor because **at least one of the following applies –**

- (a) I am a member of a network or syndicate of business angels and have been so for at least the last six months prior to the date below;
- (b) I have made more than one investment in an unlisted company in the two years prior to the date below;
- (c) I am working, or have worked in the two years prior to the date below, in a professional capacity in the private equity sector, or in the provision of finance for small and medium enterprises;
- (d) I am currently, or have been in the two years prior to the date below, a director of a company with an annual turnover of at least £1 million.

I accept that I can lose my property and other assets from making investment decisions based on financial promotions.

I am aware that it is open to me to seek advice from someone who specialises in advising on investments.



Signature

14/5/2013

Date

The Barclays Bank UK Retirement Fund (the UKRF)

Identity verification requirements

Name of the member:	Mr PT Dolan
Reference number:	0346152
Date of birth:	15 May 1964

Security identification check

As part of our security procedures, before we are able to pay a transfer value to another pension arrangement we will validate your name, address and other personal information supplied by you against appropriate third party databases. In performing these checks, information provided by you may be disclosed to a registered credit reference agency, which may keep a record of the search.

This search is done only to confirm your identity and is **not** a credit check, so it will not affect your credit rating. Any personal information used will be treated securely and strictly in accordance with the Data Protection Act 1998.

As a secondary check we will require a copy of the relevant page of your current passport showing your photograph and passport number.

If you do not have a current passport please contact us immediately and we will let you know what alternative documentation we require.

I consent to Towers Watson carrying out a security identification check and enclose a copy of my current passport.

Signature:



Date:

14/5/2013

Print name:

PAUL DOLAN

Please ensure that you complete and return this document promptly to avoid any delay in the payment of your benefits.

STATEMENT FOR CERTIFIED HIGH NET WORTH INDIVIDUALS

The statement to be signed for the purposes of article 48(2) (definition of high net worth individual) must be in the following form and contain the following content—

“Statement for Certified High Net Worth Individual

I declare that I am a certified high net work individual for the purposes of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2005.

I understand that this means:

- (a) I can receive financial promotions that may not have been approved by a person authorised by the Financial Services Authority;
- (b) the content of such financial promotions may not conform to rules issued by the Financial Services Authority;
- (c) **by signing this statement I may lose significant rights;**
- (d) I may have no right to complain to either of the following –
 - (i) the Financial Services Authority; or
 - (ii) the Financial Ombudsman Scheme;
- (e) I may have no right to seek compensation from the Financial Services Compensation Scheme.

I am a certified high net worth individual because **at least one of the following applies –**

- (a) I had, during the financial year immediately preceding the date below, an annual income to the value of £100,000 or more;
- (b) I held, throughout the financial year immediately preceding the date below, net assets to the value of £250,000 or more. Net assets for these purposes do not include –
 - (i) the property which is my primary residence or any loan secured on that residence;
 - (ii) any rights of mine under a qualifying contract of insurance within the meaning of the Financial Services and Markets Act 2000 (Regulated Activities) Order 2011;
 - or
 - (iii) any benefits (in the form of pensions or otherwise) which are payable on the termination of my service or on my death or retirement and to which I am (or dependants are), or may be entitled.

I accept that I can lose my property and other assets from making investment decisions based on financial promotions.

I am aware that it is open to me to seek advice from someone who specialises in advising on investments.



Signature

14/5/2013

Date

The Barclays Bank UK Retirement Fund (the UKRF)
The 1964 Pension Scheme

Transfer agreement

Transfer of all of the transfer value to an occupational pension scheme

Name of the transferring scheme:	The Barclays Bank UK Retirement Fund
Name of the member:	Mr PT Dolan
Reference number:	0346152
Date of birth:	15 May 1964
Guaranteed transfer value:	£543722.75
Guarantee end date:	12 June 2013

To be filled in by the administrator of the receiving occupational pension scheme

Name of the receiving scheme:

PT Dolan Retirement Benefit Scheme

Is the receiving scheme currently contracted-out?

Yes ☐

No ☒

If yes, please complete the box below.

Employer's contracted-out number:	N/A
Scheme's contracted-out number:	N/A
Date contracted-out employment began:	N/A
How any Guaranteed Minimum Pension will be revalued:	N/A

We will transfer the payment directly to the receiving scheme's bank account. Please fill in the section below.

Bank account

Name of the bank:

Bank of Scotland

Name of the account:

PT Dolan Retirement Benefit Scheme

Branch address and postcode:

No 1 LOCHRIN SQUARE
92-98 Fountainbridge
Edinburgh EH3 9DA

Account number:

1 0 0 7 9 0 6 1

Sort code:

1 2 - 2 0 - 2 6

Guarantee

We confirm to the Trustee of the transferring scheme that:

- The receiving occupational pension scheme is registered under Chapter 2 of Part 4 of the Finance Act 2004;
- The member is a member of the receiving scheme and the sums transferred will be held in connection with that member.

Signature for and on behalf of the administrator of the receiving scheme: PT Dolan Retirement Benefit Scheme

Print name: MICHELLE LUNNON

Title: ADMINISTRATOR.

Date: 29.05.13.

**The Barclays Bank UK Retirement Fund (the UKRF)
The 1964 Pension Scheme**

Statement of entitlement to a guaranteed cash equivalent

Mr PT Dolan

Personal details

Reference number:	0346152
Date of birth:	15 May 1964
Gender:	Male
Date of leaving:	16 April 1993
Date Pensionable Service commenced:	3 December 1984
Normal Retirement Date (NRD):	15 May 2024
Guaranteed Minimum Pension (GMP) age:	65
Date statement was requested:	28 January 2013
The NRD is the earliest date the member may be able to take their pension without any reduction for early retirement	

Benefit crystallisation

Percentage of standard lifetime allowance used by previous crystallisation events in this Scheme:	0.00%
Percentage of standard lifetime allowance used by previous schemes where a transfer-in has been received:	0.00%

Transfer entitlement

Guaranteed transfer value

which includes:

Scheme pension built up before 6 April 1997

Transfer value of Guaranteed Minimum Pension (GMP)	£	543722.75
Other rights	£	53852.83
	£	489869.92

Guarantee date 12 March 2013

Pension benefits

GMP built up before 6 April 1988

GMP built up after 5 April 1988

Scheme pension (over the GMP) built up before 6 April 1997

Total Scheme pension

Pension at 16 April 1993

£	238.68 a year
£	338.52 a year
£	13311.69 a year
£	13888.89 a year

State Pension Deduction

£	303.85 a year
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Please refer to the transfer guide for details of benefits payable on death before and after retirement, the

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State Pension Deduction and increases to the pension in deferment and once it is in payment.