

To:  
Brad Davis  
Pension Practioner.com  
Pension Practitioner .Com  
Daws House  
33-35 Daws Lane  
London NW7 4SD

19 January 2017

Dear Brad

Re: PRN Medical Transcription Pension Fund

I wish to consolidate my pension funds and am therefore enclosing a Warranty and Discharge from Old Mutual Wealth. I wish that account be liquidated and the money transferred to my SSAS pension scheme which you administer.

I have ticked the box to accept a CHAP transfer charge.

Yours sincerely

A handwritten signature in black ink, appearing to read 'David Bijl', with a large circular flourish at the start.

David Bijl

## PENSION TRANSFER FOR AN OLD MUTUAL WEALTH PERSONAL PENSION PLAN

### Use this form to....

Transfer your pension fund to another pension scheme. Old Mutual Wealth recommends that you consult your financial adviser before taking this action.

Please complete all the relevant sections of this discharge form in **blue or black ink, using BLOCK CAPITALS.**

At Old Mutual Wealth we are keen to improve our products and services and we value your feedback. Could you please spend a few moments on the questions below to help us understand your decision to transfer your plan.

Q1 Did you seek advice from a professional financial advisor?

Yes	<input checked="" type="checkbox"/>
-----	-------------------------------------

No	<input type="checkbox"/>
----	--------------------------

Q2 What is the main reason for deciding to transfer your policy?

Poor fund performance

☐

Premiums or charges too high/not what you expected

☒

Customer service experience

☐

To invest in a different product

☐

To Purchase an annuity

☐

No specific reason

☐

Please note that failure to provide us with all our requirements in full will result in a delay in processing this application.

Plan Number	<b>PRA 029002908</b>
1. Fund Value as at 06/05/15, not guaranteed.	<b>£ 215,471.95</b>
2. Transfer value as at 06/05/15, not guaranteed	<b>£ 215,471.95</b>

**Your personal details-** Must be completed in all cases

Surname	<b>Bijl</b>										
Forename	<b>David James</b>										
National Insurance Number	<table border="1"> <tr> <td>N</td><td>R</td><td>5</td><td>6</td><td>5</td><td>9</td><td>4</td><td>6</td><td>D</td> </tr> </table>		N	R	5	6	5	9	4	6	D
N	R	5	6	5	9	4	6	D			
Address	4 HIGHFIELD ROAD										
	MALVERN										
	Postcode	WR14 1HS									
	Tel: ☎	01684 899314									
Email Address	david.bijl@btconnect.com										

Please note if you have changed address, or notified us of a change of address, in the 6 month period prior to transfer we will require confirmation of your address. This should be in the form of a utility bill issued within the last 6 months OR driving license.

<b>Section A</b>		<b>Receiving Scheme Details</b>	
<b>To be completed by the Receiving Scheme</b>			
Name of Receiving Scheme			
Name of trustees			
Name of Scheme Administrator			
HMRC Scheme Administrator ID			
Address of Scheme administrator			
	Postcode		
Pension Scheme Tax Reference (PSTR):			
Your Reference:			
Please make payment by:	CHAPS/BACS		Please provide bank details separately
Or	Cheque payable to		
<p><b>Please Note: If the Receiving Scheme is processing your claim via the online OPTIONS system then this section below does not need to be completed by them. Your Financial Advisor will need to consult the Receiving Scheme who will confirm if they intend to use this system for your claim.</b></p> <p><b>Please tick if the claim is being processed via OPTIONS</b> <input style="float: right;" type="checkbox"/></p> <p><b>To be completed by the Receiving scheme if the online OPTIONS system is NOT being used:</b></p> <p>We declare that we are willing to accept the above transfer payment, which should be forwarded to the address given above. We authorise Old Mutual Wealth to contact HM revenue &amp; Customs and The Pensions Regulator and Financial Conduct Authority relating to any enquiry they may wish to make in relation to the Receiving Scheme.</p> <p>Signed: <span style="float: right; border: 1px solid black; width: 200px; height: 30px; display: inline-block;"></span></p> <p><b>For and/or on behalf of the Trustee/ Administrator of Receiving Scheme</b></p> <p>Print Name: <span style="float: right; border: 1px solid black; width: 200px; height: 30px; display: inline-block;"></span></p> <p>Date: <span style="float: right; border: 1px solid black; width: 200px; height: 30px; display: inline-block;"></span></p>			


## Section B: Member Declaration

I request that Old Mutual Wealth pay the transfer value in respect of the plan as indicated, and understand that the transfer payment will be made direct to the receiving scheme or, if applicable the insurance company.

I accept that payment by Old Mutual Wealth will constitute a full discharge from all liabilities and claims arising there under. Unless a partial transfer is requested.

I declare that:

a) Such payments by Old Mutual Wealth in accordance with requests made on this form shall constitute a full discharge from all liabilities and claims arising there under.

Signature of Member, and Additional Trustees if applicable <b>See note 2:</b>		Date:	19/01/2017	
		Date:		

If the payment is to be made via CHAPS please tick here ☒ Please note there is a £23 charge for this type of payment which will be deducted from your plan's value.



## **NOTES:**

1. We will use the relevant unit price on the working day after we receive the correct documents and the full information we need from the Trustees to authorise the transfer payment. To determine the correct transaction date, we will treat instructions received by us in the first post on a working day as received on that day. We will treat instructions received in a later post or delivered by any other means as received by us on the following working day.

If an instruction to transfer a Personal Pension Income Plan to another registered pension scheme is received less than 10 days before your next income withdrawal payment is due to be made, you will receive the payment that is due. After this final payment, income withdrawal payments from the Personal Pension Income Plan will cease. The gross amount of the income payment will be deducted from the cash sum being transferred to another registered pension scheme.

2. Additional Trustees – This is only applicable for retirement annuity contracts (not personal pensions), where the policy has been put under a Discretionary Trust.
3. Your surname on our system/records must match the name of the member signature on the discharge form - otherwise we require sight of your Marriage Certificate, Decree Absolute, Civil Partnership Schedule or Change of Name Deed Poll (as applicable).
4. If you or your employer are making regular contributions into your plan we recommend that the Direct Debit instruction is cancelled with the bank before your plan is disinvested. If a regular contribution is received after the plan is disinvested we will return the payment to its source.

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.