

Our ref: BB/HDMO  
Your ref: NR565946D

3 April 2017



FAO Emily McAlister  
Pensions Practitioner.com  
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NW7 4SD

Dear Emily

Plan Name: Personal Pension  
Plan Number: PRA 029002908  
Plan Holder:

Thank you for your letter dated 6th February 2017 concerning the member's transfer to a pension arrangement administered by your office.

We can confirm that this plan is a personal pension scheme, registered under Part IV of the Finance Act 2004. The PSTR is 00605470RX.

A payment for £284,712.30 has been raised today payable to your account, representing the transfer value payable in respect of this plan. The reference for this transaction is NR565946D.

The claim value was calculated using the unit prices of the member's chosen funds on 4th April 2017. The fund and transfer values on that date were:

£284,712.30 Fund Value  
£284,712.30 Transfer Value

Please note that this claim for benefits is required to go through a verification process prior to the release of monies from the plan, to ensure no errors have been made. This may result in the payment being released after the date it was raised.

- \*There are no bankruptcy or earmarking orders attached to this plan.
- \*The client's annual allowance is currently set at £40,000.00.
- \*There are no pension commencement lump sum restrictions.
- \*It is not part of a block transfer.
- \*This member does not have a protected retirement age.

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\*We have not been provided with any information regarding Primary, Enhanced or Fixed Protection.

Please note it is no longer our policy to complete Receiving Scheme application forms. All the information you require is contained in this letter.

The transfer payment is made directly to the receiving scheme in accordance with sections 266 and 169 Part IV of the Finance Act 2004 as appropriate.

This payment is full and final discharge by Old Mutual Wealth of all liabilities and claims arising under this plan number.

If you have any queries, please call our team on 0808 171 2600. Please note to protect the confidentiality and privacy of the client, we will need to verify your identity and authority. This will be established by asking you some specific details of your company, your client(s) and their plan(s) prior to any discussion.

Yours sincerely

A handwritten signature in blue ink, appearing to read "AS", located below the "Yours sincerely" text.

Anthony Scammell  
Head Of Customer Experience