

Our ref: Corporate Claims  
Date: 22 August 2018



Pension Practitioner  
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Bolton  
BL1 4AP



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**0370 165 9406**

Corporate Helpline  
Open Monday to Friday  
8.30am to 7.00pm  
Saturday 9.00am to 12.00pm

We may record and monitor calls.  
Call charges may apply.



[Corporatepensionclaims@landg.com](mailto:Corporatepensionclaims@landg.com)

Dear Sir / Madam,

## YOUR STAKEHOLDER PENSION PLAN.

**Employer: Alpha Schools Limited**  
**Arrangement number: 2679545101**  
**Member: Mrs A Bennett**

Thank you for sending discharge forms in order to commence a transfer of the above arrangement to the PTJ Pension Scheme.

In order to satisfy ourselves that this would be a recognised pension transfer, we would be grateful if you could provide us with the following information and documentation:

- Screen print of Scheme Administrators pages of the HMRC website
- Evidence that the scheme has registered with The Pensions Regulator.
- The name and address of the sponsoring employer.
- Details of the scheme's investment providers.
- Deed of Participation of Employers, as applicable

We would be grateful if you could please complete and return the attached "Further Information Checklist" along with these documents.

Please note that we will not be able to proceed with the consideration of the transfer request until all of the above information has been received. Until that time, the member's fund will remain invested in the above Legal & General plan.

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If you need more information or have any questions please contact us. For more details about Workplace Pensions please visit: [legalandgeneral.com/workplacebenefits](http://legalandgeneral.com/workplacebenefits).

Yours sincerely,

Laura Brean  
Service Specialist  
Corporate Claims

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Member's Name: Mrs A Bennett  
Account Number: 2679545101  
Receiving Scheme Name: PTJ Pension Scheme

## FURTHER INFORMATION CHECKLIST

FA60 – FB15  
WSS CLAIMS

PLEASE ENSURE THIS DOCUMENT IS ATTACHED WITH THE INFORMATION REQUESTED

The following items  
are attached.  
Please tick the  
relevant boxes.

- ☐ Scheme Registration letter from HMRC
- ☐ Evidence of registration with The Pensions Regulator
- ☐ Screen print of Scheme Administrators pages of the HMRC website
- ☐ The name and address of the sponsoring employer
- ☐ Details of the scheme's investment providers
- ☐ Scheme's Trust Deed and Rules
- ☐ Deeds of Participation of Employers, as applicable

Is the member employed by the sponsoring employer? Yes ☐ No ☐

If yes, what date was the member employed?

☐ If no, please provide details of the scheme eligibility requirement that enable them to become a member of the scheme

Please use this space  
to provide any further  
information you feel  
may be of use, or  
reasons why the  
requested information  
has not been provided.