



CARLTON JAMES

Receiving Scheme Declaration Form

Section 1

Member Name

M r P a u l A u s t i n C o x

Section 2

We undertake that the receiving Scheme is:

- A UK Registered Scheme:

☐

This is a scheme which is registered by HM Revenue & Customs under Part 4 of the Finance Act 2004 (including existing scheme that automatically acquire this new registered status on 6h April 2006). The Scheme PSTR/SF Number Is (Delete as Appropriate):

0 0 7 1 4 4 7 4 R E

- Type of scheme:

☐

A registered personal pension scheme

☐

A Small Self Administered Scheme (SSAS)

☒

Self invested personal pension (SIPP)

☐

Occupational defined contribution

- A Qualifying Recognised Overseas Scheme:

☐

For a scheme to hold 'Qualifying' Status it must evidence that:

You have achieved a letter of acceptance from a HMRC Audit and the Pension Scheme Services to confirming your registered status as a Qualifying Recognised Overseas Scheme.

Carlton James may be unable to assist in a request for the transfer of benefits to another type of scheme.

Please make sure this form is filled in, signed and dated. Once the receiving scheme declaration and supporting documentation have been evidenced and satisfies our due diligence, payment will be made via BACS. If you're unable to accept BACS please notify us at your earliest convenience.

Section 3:

New Provider Details:

Scheme Name:

L e g a l & G e n e r a l W o r k s a v e P e n s i o n P l a n

Reference Number: (If Known)

Bank Name:

T H E R O Y A L B A N K O F S C O T L A N D P L C

Account Holder Name:

L e g a l & G e n e r a l P e n s i o n

Account Number:

1 0 9 0 5 8 2 8

Sort Code:

1 6 - 0 4 - 0 0

BACS Payment Reference:
(If applicable)

S 1 0 0 0 5 2 1 0 3 - P C o x

Declaration

I/We confirm that the information given in this 'Receiving Scheme Declaration Form' is accurate to the best of my/our knowledge and belief.

*Signed for and on behalf of the receiving
scheme:*

Dated:

Chloe Newman

2 1 / 0 7 / 2 0 2 3

Print Name:

Position:

C h l o e N e w m a n

C u s t o m e r & C l i e n t A d v i s o r