



Pension Transfer Form

Section A - Client information and transferring scheme details

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|---|--|
| Full name | Gillian Thorburn |
| Permanent residential address | 7 Deva Terrace Chester CH3 5AJ |
| Date of birth | 2 April 1963 |
| National Insurance number | NA368384B |
| Vanguard Account number | VG0480488 |
| Name of transferring scheme | Registered Scheme Administrator |
| Transferring scheme address | Office 12 Merthyr Tydfil CF484DR |
| Transferring scheme phone number | 03303110088 |
| Transferring scheme member reference number (e.g. policy number) | 00797006RS |
| Transfer type | Crystallised |
| Transfer request type | Full |
| Estimated transfer value | £230,000.00 |
| Transfer method | Cash and/or Vanguard Funds Re-Registration |

Transfer authority

By signing this form:

- I authorise, instruct and apply to you the scheme administrator to transfer sums and assets from the plan(s) as listed in section A of this form directly to Vanguard and to provide any instructions and/or discharge required by any relevant third party to do so.
- I authorise Vanguard, the current scheme administrator, any contributing employer and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to Vanguard.
- I accept that in order to comply with regulatory obligations, Vanguard and the current scheme administrator named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.
- Until this application is accepted and complete, Vanguard's responsibility is limited to the return of the total payment(s) to the current scheme administrator.
- When payment is made to Vanguard as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in section A of this form where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.
- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Vanguard and the current scheme administrator may incur as a

result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application.

Client declaration

I have read the terms and conditions to the Vanguard Personal Pension.

I apply for the transfer of benefits from the pension scheme named above to the Vanguard Personal Pension and I authorise that the pension scheme pay the transfer value and/or make the asset transfer.

I confirm that I have checked the information above and that, to the best of my knowledge and belief, this information is correct and complete. Vanguard will hold and use personal information supplied by me and the registered asset holder/my current pension scheme administrator/trustee to arrange for the transfer of pension scheme benefits, set up and administer my Vanguard Personal Pension.

Client signature

A handwritten signature in black ink, reading "Gillian Harburn". The signature is written in a cursive style with a large, prominent initial 'G'.

Date 21 February 2022