



ReAssure

Mailing 0000013

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Policy number: U167557

## Transfer Payment Release Form (to transfer your pension fund to another provider)

**You may have an alternative to taking, or transferring the money from your pension, why not contact us on 0800 073 1777.**

**This form is important as it helps us to transfer your pension fund to the new Pension Provider correctly with the minimum of delay.**

### Section 1 - Information we already know

#### Part A: Your personal details

1	Policy number:	U167557
2	Policyholder name:	Mrs Susan Lucy Singleton
3	National Insurance number:	WK 99 01 46 D
4	Telephone number: (Important to resolve any queries)	07885 700223

#### Part B: Your type of UK registered pension scheme or contract

Section 32 Transfer Buy-Out Plan

#### Part C: Normal Minimum Pension Age (NMPA)

On 06 April 2028, the Government is increasing the Normal Minimum Pension Age (NMPA) from 55 to 57. This means that from 06 April 2028, you will have to wait until you reach age 57 to take money from your pension.

We recommend you get independent professional advice from a Financial Adviser if you're unsure what to do. A Financial Adviser can make a personal recommendation based on your individual circumstances and the options available to you. If you don't have an adviser **[www.moneyhelper.org.uk](http://www.moneyhelper.org.uk)** can provide you with impartial guidance, useful tools and calculators or help you find a financial adviser.

#### Part D: Current value details

Current value	£28,367.11
The current transfer value, which can be taken from age 55 is	£0
The current transfer value, which can be taken in line with the NMPA is	£28,367.11

ReAssure Ltd, Registered Office: Windsor House, Telford Centre, Telford, Shropshire, TF3 4NB  
Registered in England No. 754167

Tel: 0800 073 1777 Fax: 0808 168 3331 Website: [www.reassure.co.uk](http://www.reassure.co.uk)

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Firm reference number 110495. Member of the Association of British Insurers.

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### Section 1 - Information we already know (continued)

#### Notes:

The current value is calculated as at 18 June 2023. The current value amount is not guaranteed and we will re-calculate it on the day after we receive this correctly completed form from you.

### Section 2 - Confirmation from the policyholder (and the member)


#### Part A: Declaration by the policyholder or trustee

Please return your original policy documents with this form. If you cannot find them, then please read the section below.

I/~~We~~ have carried out a diligent search in all the places I/we would expect to find the policy documents. I/~~We~~ have also made enquiries of all people who may be able to give me/us information about their whereabouts but I/we have had no success in locating the policy documents.

If I/we find out where the policy documents are, I/we will inform you immediately. I/We will also return the documents to you as soon as I/we find them.

I/We authorise payment of the current value to the receiving scheme, details of which the receiving scheme administrator has completed in Section 3, Part A. On payment of the transfer I/we discharge ReAssure from any and all liability under the policies numbered in Section 1, Part A.

Signature of policyholder/trustee:		Date: 31/7/23
Print name:	SUSAN LUCY SINGLETON	
Position:	POLICY HOLDER	

Signature of policyholder/trustee:		Date:
Print name:		
Position:		

Signature of policyholder/trustee:		Date:
Print name:		
Position:		





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**Section 2 - Confirmation from the policyholder (and the member) (continued)**

Signature of policyholder/trustee:		Date:
Print name:		
Position:		

Where the member is NOT the policyholder, please sign below:

**Part B: Declaration by the member**

Choosing what to do with your pension pot is an important financial decision. We recommend you use the government's free, impartial guidance service, called Pension Wise from MoneyHelper, or get personalised financial advice, before making any decision about which option is most suitable for your personal circumstances. You can make an appointment with one of Pension Wise's specialists at [moneyhelper.org.uk/pensionwise](https://moneyhelper.org.uk/pensionwise) by calling them direct on **0800 100 166** or we can book an appointment for you.

Have you spoken with Pension Wise about taking this option?



Yes, on 10 - 04 - 23



No, I didn't want guidance from Pension Wise



No, I've spoken to a regulated financial adviser instead



No, I didn't have enough time

Signature of member:		Date: 31/7/23
Print name:	SUSAN WCY SINGLETON	

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