

Sollis Property Finance Consultants Pension Scheme  
Daws House  
33-35 Daws Lane  
London  
NW7 4SD

Date of this letter

**10/06/2014**

Our reference

**4004234828**

Policyholder

**Mr Richard Sollis** **0845 603 3419**

Open weekdays 8:00am-6:00pm

 **01306 879 055** **PO Box 1810, Bristol,  
BS99 5SN** **friendslife.co.uk**

## Transferring of Benefits

Dear Sir or Madam,

Thank you for your request received in our office on 05/06/2014 regarding transferring the above plan to your scheme.

In order to proceed we require the enclosed form to be fully completed. Please arrange for this form to be completed and returned.

I hope that this information is useful. If you need any more information or have further questions, please contact us and we will be happy to help. So that we can deal with your queries quickly and efficiently, please quote the reference shown at the top of this letter.

If you change your email or postal address, landline or mobile number, please let us know so that we can update our records to keep in contact with you.

Yours sincerely

Tom Perry

Customer Service Representative

### These documents are available in other formats

If you would like a Braille, large print or audio version of this document, please contact us

**Part B**

**Receiving Scheme Information Requirements and Declarations**

1. I/We enclose a copy of the HMRC registration document\* and confirm that the scheme has not subsequently been de-registered. (\* Where the scheme was deemed registered from 6 April 2006, this will be the scheme's original approval letter. Where the scheme was established on or after 21 October 2013 this must be the letter showing the date registered pension scheme status is effective from and not an acknowledgement.)
2. If the receiving scheme is a non-insured Defined Contributions Occupational Pension Schemes I/we enclose copies of:  
☐ the trust deed and scheme rules  
☐ member's booklet and/or other promotional literature  
(please tick all or provide an explanation of why they are not enclosed)
3. I/We confirm that the receiving scheme is willing and able to accept the transfer payment.
4. I/We consent to the scheme administrator of the transferring scheme (Friends Life and/or the transferring scheme trustees) referring this proposed transfer to HMRC and for HMRC to provide information to the scheme administrator relating to the registration of the receiving scheme.
5. I/We understand that where the scheme administrator:
  - has any doubt that the transfer may not be a recognised transfer under section 169 of the Finance Act 2004; or
  - believes that the receiving scheme does not have the characteristics of a genuine occupational pension scheme; or
  - believes that the member, the scheme administrator and/or Friends Life may incur tax charges, claims or losses following the transfer

the scheme administrator reserves the right to decline the transfer request and they and/or Friends Life will share information about the transfer/scheme/agents with Action Fraud, HMRC, the Pensions Regulator and/or the Financial Conduct Authority (as appropriate).

.....  
Signed of behalf of the receiving scheme

.....  
Date