TAG Wealth Management

RETIREMENT • PROTECTION • INVESTMENTS • TAXATION

Ms G Stuligulowa
Pension Practitioner
Daws House
33-35 Daws Lane
London
NW7 4SD

17 October 2016

Dear Ms Stuliglowa

RE: Power System Services Ltd Pension Scheme

Please find enclosed the transfer form for the above scheme for you to complete in order to proceed with the transfer.

Should you have any queries please don't hesitate to contact me.

Yours sincerely

Rhianna Noble
Administration Apprentice

Head Office: Riverdale, 89 Graham Road, Sheffield S10 3GP **Tel:** 0114 263 0888
Email: info@tag.uk.com **Web:** www.tagwealth.co.uk

AVIVA

Transfer form

Please fill in this form using black ink and in BLOCK CAPITALS and send it back to us at this address: Aviva, PO Box 520, Norwich, NR1 3WG.

For us to continue working through your transfer, we need you to fill in this form **completely**.

Aviva scheme details

Plan number **SM93321438**

Plan holder name **Paul Beauchamp**

Details of new pension provider

New pension provider PENSION PRACTITIONER

Department

Address DAWS HOUSE
33-35 DAWS LANE
LONDON
NW7 4SD

Contact name, if known

New plan number, if known

I understand that:

- if I have been given an illustration of benefits, the amount Aviva transfers may differ from the amount shown on the illustration.
- where the payment represents all of the benefits under the plan, then Aviva is discharged from its obligation to make any further payments under that plan.
- where the payment represents part only of the benefits under the plan, Aviva is discharged from its obligation to make any further payments in respect of that part of the plan represented by the payment.
- any payment does not discharge Aviva for any act/error in dealing with the plan.
- if the benefits are moved to another provider, Aviva cannot accept them back into this plan.

What this means to you:

1) The value we transfer may be different to the amount shown in any illustration of benefits we may have given you.
2) When all the money in your pension plan is transferred to your new provider we won't be responsible for paying you any more money from that plan.

AVIVA

Transfer form

3) When part of the money in your pension plan is transferred to your new provider we'll only be responsible for the money that's been left in your Aviva plan. We won't be responsible for the amount we've transferred to your new provider.
4) Even if we transfer some or all of the money in your plan to a new provider, we'll still be responsible if we later find we've made a mistake with your plan.

Please only sign here if you have read all the information on this form and are sure you want to transfer your pension benefits to another provider. Doing so will mean you will lose any features or guarantees you may have with us.

Please pay the transfer value of the plan named on this form.

Plan holder's signature

Date 12.10.16

AVIVA

Transfer form – new pension provider

Please make sure this form is filled in by **your new pension provider** using black ink and in BLOCK CAPITALS and send it back to us at this address: Aviva, PO Box 520, Norwich, NR1 3WG.

Aviva scheme details

Plan number **SM93321438**

Plan holder name **Paul Beauchamp**

New pension provider details

Scheme / contract name POWER SYSTEM SERVICES LTD PENSION SCHEME

Scheme / contract number

Bank details for new provider

Bank METRO BANK

Account holder name POWER SYSTEM SERVICES LTD PENSION

Account number 19273075 Sort code 23 05 80

BACS payment reference

Type of scheme – please tick one box only

A registered personal pension (including stakeholder) scheme

✓ Small self administered schemes (SSAS)

Self invested personal pension (SIPP)

Occupational defined contribution

Occupational defined benefit

For any of these schemes please fill in section 1 ***and*** *section 3*

Overseas scheme
Please contact us for an overseas transfer quote on ***0800 068 6800***

Any other type of scheme
Please fill in section 2 ***and*** *section 3*

Transfer form – new pension provider

Section 1

New pension provider HMRC registration / approval reference number

Date approved

Name and address of new provider

Please enclose a copy of your HMRC registration / approval letter

Section 2

Type of scheme

Receiving scheme approved by tax authority

Tax authority reference number

Please enclose a copy of your HMRC registration / approval letter

Section 3 – Declaration of new pension provider

Please sign the declaration below.

I confirm the above statements are true. When we receive and accept the transfer request we'll use it to provide benefits for, or in relation to, the member of the scheme. This is in accordance with the appropriate regulations made under the Pension Schemes Act 1993.

Signed

Position

Signing for and on behalf of
the trustees / administrators of

Date

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Personal pension plan details

Plan number	SM93321438
Plan holder	Paul Benjamin Beauchamp
Date of birth	24 February 1967
Retirement age	65
Beneficiaries	Mrs Josie Beauchamp 100%
Plan name	Stakeholder Pension
Start date	1 October 2006
Plan status	Active
Trust	No
Life cover	None
Waiver of payment	None - it's no longer possible to add this.
PST reference no.	00613774RB

Plan regulations **This contract is a registered pension scheme under Part 4 of the Finance Act 2004**

Fund values

These amounts aren't guaranteed and may go up or down in the future

Fund value	£93,722.16
Transfer value	£93,722.16

We've based these figures on the values as at **5 October 2016**.

Visit aviva.co.uk/savings-and-retirement and use the Retirement Planner to assess the estimated future value of this pension plan and how much income it could generate.

Plan activity

Recent switches	None
Protected tax free cash	None
Pension sharing / Earmarking order	Please speak to the plan holder
Primary / Enhanced protection	Please speak to the plan holder

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Plan holder: Paul Benjamin Beauchamp **Plan number: SM93321438**

Don't forget...

We have a range of options your client may find suitable if they're thinking about transferring. If you'd like more information please contact us or visit aviva-for-advisers.co.uk.

I've enclosed discharge forms if your client wants to transfer this plan. However, please remember this plan is supported by Origo options.

- *Bringing all your client's pensions together in one place with Aviva could save money for your client and time and admin costs for you*
- *Our pension portfolio is a flexible, online, self-invested pension with access to thousands of investment choices and income drawdown facility*