

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

04 July 2016

Dear Sirs

RE: P Beauchamp Transfer form

Please find enclosed a letter from the above client instructing you to proceed with the transfer of his Aviva policy to yourselves.

Also enclosed is the transfer form to be completed by you.

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

Yours faithfully



Rhianna Noble
Administration Apprentice

Grindle Cottage
Lowside
Calver
Hope Valley
Derbyshire
S32 3XQ

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

24 June 2016

Dear Sirs

RE: Aviva Transfer

Please accept this letter as my authority to transfer my Aviva Policy (SM93321438) to my Power Systems Service Ltd Pension Scheme I have with yourselves.

I have enclosed the appropriate forms to enable you to complete this.

If you have any queries please feel free to contact me.

Yours faithfully

A handwritten signature in black ink, appearing to be 'Paul Beauchamp', written over a horizontal line.

Paul Beauchamp

Transfer form – new pension provider

Please make sure this form is filled in 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

Please ask the new pension provider to give the following information.

New pension provider details

Scheme / contract name

Scheme / contract number

Bank details for new provider

Bank

Account holder name

Account number

Sort code

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

Receiving scheme HMRC registration / approval
reference number

Date approved

Name and address of receiving life office

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, on behalf of the receiving scheme.

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

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.

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

GEORGINA STULIGLOWA

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.

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.
- 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.

Transfer form

- 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

30 - JUNE - 2016