

Pinnacle House 2 Rectory Road Hadleigh Essex SS7 2ND

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

Re: Pension Documents

Dear Brad,

Please find enclosed Deeds, set-up documents along with the x2 £936.00 cheques for Susan & Damon Baxter. I have spoken to the introducer regarding Damons discharge forms and he has stated that with Standard Life pensions they only require a letter and no discharge forms are needed.

Susan Baxter, I have requested her birth/Marriage certificate from the introducer and im awaiting this to come in.

I have also included Bhavesh Patels cheque for the sum of £300.00 as requested.

Yours Sincerely

Ashley Dumas

Senior Administrator



Daws House 33-35 Daws Lane London NW7 4SD

Freephone: 0800 634 4862

Fax: 020 8711 2522

Email: info@pensionpractitioner.com

pear suson, flease sign and data the endosed pischarge form where marked and return it to the ossive.

Many thanks
Kind regards
BRAD PAVIS
with complimen



Transfer payment instruction

Please return to: Aviva, Business Capture Centre, PO Box 520, Norwich, NR1 3WG

Our Reference: PP/INFO/AK

Name: S Baxter

Plan Number: PP44173307

IF YOU TRANSFER TO A PERSONAL PENSION OR A PENSION BUY OUT PLAN WITH AVIVA, WE WILL REQUIRE WRITTEN CONFIRMATION FROM YOU, THAT YOU HAVE SOUGHT FINANCIAL ADVICE.

Please make sure that this form is fully completed in BLOCK CAPITALS before returning it to Aviva, to avoid any delay in paying the transfer value.

Payments will be made directly to y	our chosen pension provider.	
Payee: (this must be a pension provider)		
Department:		
Address:		
	Postcode	
Contact Name (if known)		
New policy number (if known)		



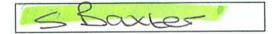
Please pay the transfer value in respect of the above mentioned plan.

I understand that:

- the amount actually payable may differ from that shown in the illustration for the reasons explained in the transfer section
- where the payment represents all of the benefits under the plan then payment made as requested will discharge Aviva of all liability in respect of this plan
- if the payment represents just part of the benefits under the plan then the discharge of liability will only be for the part of the plan represented by the payment
- where any benefits remain with Aviva, liability for these will remain with them

Please make sure this form is fully completed and signed in the box below. This will help us pay your benefits as quickly as possible.

Signature of Planholder:



Date:

	AVI	VA
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Transfer out warranty

Please return to: Aviva, Business	Capture Centre, PO Box 520, Norwich, NR1 3WG
Our Reference: PP/INFO/AK	
Individual Personal Pension - P	P44173307
Member name: S Baxter	
Transferring Scheme Deta	ils
Transferring Scheme:	Individual Personal Pension
Plan number:	PP44173307
Please make sure that this doc returning it to Aviva, to avoid a	ument is fully completed in black ink and BLOCK CAPITALS before ny delay in settling the benefits.
To be completed by the Trustee	es/Administrator of the receiving scheme/contract.
Receiving Scheme details	
Always complete	
Receiving scheme / contract name	
Receiving scheme / contract number (if known)	
Name of bank:	
Name in which account is held:	
Account number:	Sort code:
BACS payment ref:	
Type of scheme Please tick only one	
Insured registered s	scheme (Now complete Section 1)

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Transfer illustration prepared for Mrs S Baxter - PP44173307

Date: 11th July 2012

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	A scheme registered (or	deemed registered) under Part 4 of the Finance Act 2004.			
	Self administered registe	ered scheme (Now complete Section 2)			
	A registered scheme wh insurance premiums, by investment manager.	ere the assets are invested, other than wholly by payment of the trustees, an in house investment manager or an external			
	Buy out e.g. S32 or repla	acement contract (Now complete Section 3)			
	the member or other ber	s of a registered scheme of an insurance policy in the name of neficiary, in lieu of entitlement to benefit from the scheme, the member's Pensionable Service.			
	Overseas scheme (Nov	v complete Section 4)			
	Further information will t	pe needed. Details will be supplied.			
	Retirement Annuity Con	tract (RAC) (Now complete Section 4)			
	Other (Now complete Section 4)				
	Statutory scheme (Now complete Section 5)				
	A scheme (usually in the	e public sector) established by an Act of Parliament.			
Section 1 ·	- Complete for an insure	d registered scheme underwritten by a Life Office.			
Customs (l	scheme HM Revenue & HMRC) registration / sference number				
The norma	l retirement age under e is				
Name of th	e receiving Life Office				
Address					
		·			

AVIVA

Is a copy of the HMRC registration/approval e-mail or letter attached?			
Yes		No	
Now com	iplete Sect	ion 5.	

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Section 2 - Complete for a self add	ministered registered scheme
Receiving scheme HM Revenue & Customs (HMRC) registration / approval reference number	
The normal retirement age under the scheme is	
Is a copy of the HMRC registration/a	approval e-mail or letter attached?
Yes No	
Payment will only be made to you	as Scheme Administrator of the Receiving Scheme.
Now complete Section 5.	
Section 3 - Complete for a Buy ou	it
her dependants. The policy that will be issued me	nt from this policy, you will issue a policy for the benefit of Mrs Baxter and/or ets the requirements of section 153(8) of the Finance Act 2004. It will also oct under section 19(4) of the Pension Schemes Act 1993.
Now complete Section 5.	
Section 4 - Complete for an overs	seas scheme, RAC or Other
Receiving scheme approved by (tax authority)	
Tax authority reference number	
The normal retirement age under the scheme is	
Now complete Section 5.	
Section 5 - Declaration on behalf	of the receiving scheme
I confirm that the above statements provide benefits for or in respect of regulations made under the Pensio	are true. On receipt and acceptance of the transfer, it will be applied to the member under the receiving scheme in accordance with the appropriate n Schemes Act 1993.
Signed	
Position	

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For and on behalf of the Trustees/Ad	dministrato	ors of		
Date		. /		