

Ms Emily McAlister
Pension Practitioner.com
Daws House
33-35 Daws Lane
London
NW7 4SD

Dear Ms McAlister

Collective Retirement Account for Mr Michael Strafford

We write with reference to a recent request we have received from the above client, to transfer away to a scheme administered by your office.

To enable us to assist with the transfer of this policy, we would be grateful if you could please provide the following information in regard to the Northern Bus Retirement Benefit Scheme.

A copy of the Scheme Rules
A copy of the Establishing Deed
A copy of The Pension Regulator's registration certificate
A copy of scheme T&C's / Key Features Document
Confirmation of whether the scheme is an Occupational Pension Scheme
A copy of the Key Features document or members booklet for the Scheme
Details of the sponsoring employer
Details of the member's employment with the sponsoring employer of the Establishing Scheme
Details of the investment service providers the scheme is linked to
Written authorisation that Old Mutual Wealth can contact HMRC in relation to the Northern Bus Retirement Benefit Scheme

Please note that there will be a delay in processing the transfer request while we are carrying out these additional checks. In light of this, we would be grateful if you could provide all the information requested, in writing as soon as possible.

We will also be contacting the client to make them aware of the possible delays involved in processing the transfer.

If you have any questions about this letter, please contact us using the details shown.

Yours sincerely



Anthony Scammell
Head of Customer Experience

10 March 2016

Call us
Customer Contact Centre
Freephone: 0808 171 2626

Open Mon – Fri 8.00am to 9.00pm

Email us
ask@omwealth.co.uk

Write to us
Old Mutual Wealth
Old Mutual House
Portland Terrace
Southampton
SO14 7AY

Visit our website
www.oldmutualwealth.co.uk

Your details
Client reference: 1-187254064

Account number: 400018249

Enclosed with this letter

What to do next

- Let us or your adviser know if you have any questions about this letter

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Old Mutual Wealth provides you with access to its investment platform. Within this platform you can open an ISA and Collective Investment Account provided by Old Mutual Wealth Limited and a Collective Retirement Account and Collective Investment Bond provided by Old Mutual Wealth Life & Pensions Limited.

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