

Trafford House Chester Road Manchester M32 ORS

www.sippcentre.co.uk

Pension Practitioner . Com Limited Daws House Daws Lane Mill Hill London NW7 4SD

15 May 2014

Dear Sirs

Mr Victor Herbert Johnson Sippcentre SIPP re V H Johnson: SCC343278 The Victor Johnson SSAS

I refer to the above and the in-specie transfer of benefits from Mr Johnson's SIPP to a policy with you.

A payment of £122,507.88 has been transferred to your bank account via CHAPS, under reference VICTOR JOHNSON. The remaining value of £925,000.00 consists of the assets detailed on the attached schedule.

It is not our current practice to complete other company's questionnaires. To simplify matters, information is provided in a standard format. I am sorry if the information is not in the format you have requested but trust it will satisfy your requirements.

This transfer represents a full discharge of the liability of A J Bell Management Limited and Sippdeal Trustees Limited in respect of the above SIPP.

As the member's SIPP contained funds in drawdown and has transferred to you in its entirety, a P45 has been generated. Part 1 has been sent to HMRC, Part 1a to the member and I enclose for your records. Parts 2 and 3.

If you have any questions, please contact me.

Yours faithfully

Alex Buck SIPP Administrator

Enc Transfer Information Form

Schedule of Assets

### **Transfer Information Form**

To the Administrators/Trustees of:

The Victor Johnson SSAS

**Transferring Member Details** 

Title: Mr

Surname: Johnson Forename(s): Victor Herbert Member Number: SCC343278 Date of Birth: 2 August 1955

**Transferring Scheme Details** 

The scheme is a registered pension scheme under Chapter 2 of Part 4 Finance Act 2004.

Name of Transferring Scheme: Sippcentre SIPP

Address of Administrators: A J Bell Management Limited

Trafford House Chester Road Manchester M32 0RS

Contact Name:

Telephone Number:

Pension Scheme Tax Reference (PSTR):

Alex Buck
0845 8399 060
00605674RH

Transfer Value Information

Total transfer value: £1,047,507.88

Cash value: £i22,507.88 Value of assets transferred in-specie: £925,000.00

A list of any assets transferred in-specie is enclosed with this form.

Date of Transfer: 14 May 2014

Fund split of transfer value:

Post A-Day drawdown fund: £1,032,384.20 Post A-Day drawdown fund: £15,123.68

If the transfer contains drawdown funds, full details are contained in the following section.

Divorce and Bankruptcy:

These pension benefits, to the best of our knowledge, are not subject to any Pension Sharing or Earmarking Orders.

These pension benefits, to the best of our knowledge, are not subject to an Income Payments Agreement/Order in respect of a bankruptcy.

Crystallised Benefits / Benefits in Payment

•	Post A-Day drawdown	Post A-Day drawdown
The date benefits were first crystallised.	Unknown *	Unknown *
The commencement date for the current reference/review period.	20 November 2011	14 March 2012
The current maximum annual income limit.	£22,459.25	£303.00
The GAD basis for the current maximum annual income limit (i.e. 100% or 120%).	120%	120%
The amount of income paid in the current pension income year up to the date of transfer.	£22,459.25	£0.00
For Post A-Day drawdown only, the value of the amount(s):  initially designated to drawdown pension; paid as pension commencement lump sum(s).	£1,613,796.49 Unknown *	£39,369.71 Unknown *
The percentage of the standard lifetime allowance used by all BCEs under the transferring scheme.	80.14%	3.16%

<sup>\*</sup> The ring fenced Post A-Day drawdown tranches were transferred in from differing pension schemes. As such, the original benefit crystallisation event occurred at these pension providers and so the outstanding information was not supplied to the Sippcentre upon receiving each transfer.

For and	d on	behalf	of A	J Bell	Managemen	t Limited

Signed	Date 16/05/2014
	•
Name CGN GXLALO	Position TEAM LEACE

## Schedule of Assets Transferred from Sippcentre SIPP re V H Johnson

Description of Asset	Value of Asset
The Post Office Riverside Walk	£660,000.00
37 – 39 Riverside Walk	£265,000.00



# P45 Part 2 Details of employee leaving work

Copy for new employer

1 Employer PAYE reference Office number Reference number  0 0 0 / 1 2 0 7 7 5 5  2 Employee's National Insurance number  Y X 2 5 3 2 5 7 A	5 Student Loan deductions  Student Loan deductions to continue  6 Tax Code at leaving date  If week 1 or month 1 applies, enter 'X' in the box below.
3 Title - enter MR, MRS, MISS, MS or other title	Week 1/Month 1
U/K	7 Last entries on P11 Deductions Working Sheet.
Surname or family name	Complete only if Tax Code is cumulative. If there is an 'X'
JOHNSON	at box 6, there will be no entries here.
First or given name(s)	Week number Month number
VICTOR HEARCHT	Total pay to date
4 Leaving date DD MM YYYY  1 4 0 5 2 0 1 4	E O O · O O  Total tax to date  £ O O · O O

### To the employee

This form is important to you. Take good care of it and keep it safe. Copies are not available. Please keep Parts 2 and 3 of the form together and do not alter them in any way.

#### Going to a new job

Give Parts 2 and 3 of this form to your new employer, or you will have tax deducted using the emergency code and may pay too much tax. If you do not want your new employer to know the details on this form, send it to your HM Revenue & Customs (HMRC) office immediately with a letter saying so and giving the name and address of your new employer. HMRC can make special arrangements, but you may pay too much tax for a while as a result of this.

#### Going abroad

If you are going abroad or returning to a country outside the UK ask for form P85 *Leaving the United Kingdom* from any HMRC office or Enquiry Centre.

#### Becoming self-employed

You must register with HMRC within three months of becoming self-employed or you could incur a penalty. To register as newly self-employed see The Phone Book under HM Revenue & Customs or go to www.hmrc.gov.uk to get a copy of the booklet SE1 Are you thinking of working for yourself?

#### Claiming Jobseeker's Allowance or Employment and Support Allowance (ESA)

Take this form to your Jobcentre Plus office. They will pay you any tax refund you may be entitled to when your claim ends, or at 5 April if this is earlier.

### Not working and not claiming Jobseeker's Allowance or Employment and Support Allowance (ESA)

If you have paid tax and wish to claim a refund ask for form P50 *Claiming Tax back when you have stopped working* from any HMRC office or Enquiry Centre.

#### Help

If you need further help you can contact any HMRC office or Enquiry Centre. You can find us in The Phone Book under HM Revenue & Customs or go to www.hmrc.gov.uk

#### To the new employer

Check this form and complete boxes 8 to 18 in Part 3 and prepare a form P11 *Deductions Working Sheet.*Follow the instructions in the Employer Helpbook E13 *Day-to-day payroll*, for how to prepare a P11 *Deductions Working Sheet.* Send Part 3 of this form to your HMRC office immediately. Keep Part 2.



## P45 Part 3 New employee details

For completion by new employer

Employer PAYE reference	5 Student Loan deductions
Office number Reference number	
050/8207755	Student Loan deductions to continue
Employee's National Insurance number	6 Tax Code at leaving date
Employees National insurance number	61
	If week 1 or month 1 applies, enter 'X' in the box below
Title - enter MR, MRS, MISS, MS or other title	Week 1/Month 1
U/r	7 Last entries on P11 Deductions Working Sheet.
Surname or family name	Complete only if Tax Code is cumulative. If there is an
LINSON	at box 6, there will be no entries here.
First or given name(s)	Week number Month number
WILE HOEBERT	Total pay to date
Landa data DD MANAGA	£ 00.00
Leaving date DD MM YYYY	Total tax to date
TA C 2 VC 1 A	£ 00.00.00
the new employer Complete boxes 8 to 18 and send	P45 Part 3 only to your HMRC office immediately.
New employer PAYE reference	15 Employee's private address
Office number Reference number	
Date new employment started DD MM YYYY	
	Postcode
Works number/Payroll number and Department or branch (if any)	
(ii dily)	16 Gender. Enter 'X' in the appropriate box
	Male Female
	17 Date of birth DD MM YYYY
Enter 'P' here if employee will not be paid by you	17 Date of birth DD MM YYYY
between the date employment began and the	
next 5 April.	Declaration
Enter Tax Code in use if different to the Tax Code at box 6	18 I have prepared a P11 Deductions Working Sheet
	in accordance with the details above.
If week 1 or month 1 applies, enter 'X' in the box below.	Employer name and address
Week 1/Month 1	
If the tax figure you are entering on P11 Deductions Working Sheet differs from box 7 (see the E13 Employer	
Helpbook Day-to-day payroll) please enter the	
figure here.	Postcode
figure here.	
figure here.	
figure here.  £  New employee's job title or job description	Date DD MM YYYY