

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

Ref: RMP/KK 03 December 2013

Dear Sirs

RE: Winter SSAS Pension Scheme

Please find enclosed two transfer discharge papers for Transact.

These will need to be dated following the issue of the PSTR number. They also require Pension Practitoner.com to sign the appropriate section.

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

Yours faithfully

ws.

Katie King

Administrator - Client Services

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Transact Pension Transfer Out Warranty

Section A - Plan Details

Client Name	Albert Grahame Winter	
Plan Type	Personal Pension (Capped Dra	wdown)
Membership Certificate Numb	er 0000239245	
Transact Portfolio Number	858-942-622	
Current Value (Not guaranteed)	Pension Rights	£104,823.30
(NOC guaranteeu)	Section 9(2b) Rights	20.03
	TOTAL TRANSFER VALUE	£104,823.30
Valuation Date	01/10/2013	
None of the benefits from this	transfer are subject to an 'ea	rmarking' order.
Please Note		
 The actual transfer value will funds are disinvested and the quarter. 	l depend on the value of the asset e amount of any outstanding chai	ts held on the day that rges in the current
• Please indicate if existing as	sets are to be transferred:	
In Specie		
	Sell all assets and convert to cash prior	·
Partial	f Partial transfer required, please provice ransferred. Please Note , partial transfe accrual or partial annuity transfers	ie % of benefits to be irs are only applicable to

Section A - Plan Details Contd.

Pension Details

Income Commencement Date 24/08/2012

Date of Last Review 24/08/2012

Max GAD Income £4,492.76

Amount of Lifetime Allowance Used 7.08%

Transact Scheme Details

PSTR Number

00605455RP

This payment comes from a Registered Pension Scheme approved under Part 4 of the Finance Act 2004. Formerly an approved Personal Pension scheme under Chapter IV of Part XIV of ICTA 1988.

Member Declaration

I hereby request that IntegraLife UK Limited pay the current value of the benefits I have requested in my Transact Personal Pension to the receiving arrangement indicated in Section B below.

I confirm that this payment represents a full discharge of all the benefits in the policy and that IntegraLife UK Limited will have no further liability or obligation in respect of the policy.

Signed		Date
C	X,	1
	0	

Section B - Receiving Scheme Declar	ration
Members Name	
•••	
Name of Scheme	
We undertake that the receiving Scheme is:	
(a) A UK Registered Scheme: this is a scheme which is registered under Part 4 of the Finance Act 2004, (including existing scheme this new registered status on 6th April 2006). The HMRC. Refer	nes that automatically acquire
SF/PSTR	
(b) A Qualifying Recognised Overseas Scheme: for a recognise 'Qualifying' scheme and retain qualifying status, the scheme mand evidence that:	ed overseas scheme to become a nanager must provide information
The scheme satisfies all of the requirements as described Overseas Scheme	d below for a Recognised
 Undertake to notify HM Revenue & Customs if the scheme Overseas Scheme and supply them with information whe scheme members. 	ne ceases to be a Recognised en making payments to certain
We enclose a copy of the acceptance letter from HMRC A Services confirming the receiving scheme is a Qualifying (Please tick this box to confirm the letter is enclosed).	
Transact is unable to transfer benefits to any other type of	scheme.
I declare that the receiving scheme is prepared to accept to will be used to provide appropriate retirement benefits with	
Scheme Particulars	
Registered Pension Scheme Number	

Please note that where transfers are being made to the provider/insurer).	o ouier insured s	uiemes, payi	ment will only be	made t
lame and address of pension provider or so	theme to which	transfer is	to be made.	·-···
	Postcode			
ccount Name		÷ ···· • · • · · · · · · · · · · · · · ·	·····	
		·		
ank Name and Address				
				-
	Postcode	·	Technical annual Photo Wald Washington	
Sort Code		Accoun	t Number	
		<u> </u>		
	nt Reference			
Peclaration /we* confirm that the Information given in ny/our* knowledge and belief. *Delete where appropriate)	section B abov	e is accura	te to the best	of
Signed for and on behalf of the receiving scheme	Date			
		/	/	·· —-
rint Name	Position			
		1	1	
ompany Stamp				*************

Payment Details

Transact Pension Transfer Out Warranty

Section A - Plan Details

Client Name

Albert Grahame Winter

Plan Type

Personal Pension (Capped Drawdown)

Membership Certificate Number 0000239245

Transact Portfolio Number

858-942-622

Current Value

Pension Rights

£269,079.26

(Not quaranteed)

Section 9(2b) Rights

£0.00_

TOTAL TRANSFER VALUE

£269,079.26

Valuation Date

01/10/2013

None of the benefits from this transfer are subject to an 'earmarking' order.

Please Note

- The actual transfer value will depend on the value of the assets held on the day that funds are disinvested and the amount of any outstanding charges in the current
- Please indicate if existing assets are to be transferred:

In Specie Cash (Sell all assets and convert to cash prior to transfer) If Partial transfer required, please provide % of benefits to be **Partial** transferred. Please Note, partial transfers are only applicable to accrual or partial annuity transfers

Section A - Plan Details Contd.

Pension Details

Income Commencement Date	22/09/2007
Date of Last Review	22/09/2011
Max GAD Income	£11,428.46
Amount of Lifetime Allowance Used	57.02%

Transact Scheme Details

PSTR Number

00605455RP

This payment comes from a Registered Pension Scheme approved under Part 4 of the Finance Act 2004. Formerly an approved Personal Pension scheme under Chapter IV of Part XIV of ICTA 1988.

Member Declaration

I hereby request that IntegraLife UK Limited pay the current value of the benefits I have requested in my Transact Personal Pension to the receiving arrangement indicated in Section B below.

I confirm that this payment represents a full discharge of all the benefits in the policy and that IntegraLife UK Limited will have no further liability or obligation in respect of the policy.

Signed ()		Date
X	\ \	1

Se	ction B - Rece	eiving Scheme Declaration	
Mer	mbers Name		
NI I	Number		
Nar	ne of Scheme		
Plar	n Number (if known)		1
We :	undertake that the recei	iving Scheme is:	
(a)	under Part 4 of the Finan	me: this is a scheme which is registered by HM Revenue & Customs ace Act 2004, (including existing schemes that automatically acquire s on 6th April 2006). The HMRC. Reference is:	Ī.,
	SF/PSTR/	'	
(b)	A Qualifying Recognise 'Qualifying' scheme and and evidence that:	ed Overseas Scheme: for a recognised overseas scheme to become retain qualifying status, the scheme manager must provide information	a on
	The scheme satisfic Overseas Scheme	es all of the requirements as described below for a Recognised	
	 Undertake to notify 	y HM Revenue & Customs if the scheme ceases to be a Recognised and supply them with information when making payments to certain	
	Services confirming	of the acceptance letter from HMRC Audit and Pension Scheme g the receiving scheme is a Qualifying Registered Pension Scheme. ox to confirm the letter is enclosed).	
Trar	nsact is unable to trans	sfer benefits to any other type of scheme.	
I de will	clare that the receiving be used to provide app	g scheme is prepared to accept the transfer payment and the propriate retirement benefits within the receiving arrangement.	nat it ent.
Sch	eme Particulars		
Reg	istered Pension Schem		

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	Postcode	-		
count Name		· · · · · · · · · · · · · · · · · ·		
nk Name and Address				
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	please conta	e is accura	te to the best	

Payment Details