



The Pensions Trust

7 August 2015

Private and Confidential

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

Our ref: 078/FS/NS445378A/JLT11595671
Member Ref: 11119508

Dear Sir/Madam

**The Pensions Trust ("the Scheme") – Growth Plan Series 4
Miss SA Malthouse - NS445378A**

I have received a request to obtain transfer value details in respect of the above member who is considering transferring previous pension benefits into the Scheme.

Please arrange for the attached form to be completed and returned to us as soon as possible. The member's signed authority is enclosed.

If you require any further information or have any questions please contact our UK based Pensions Support Team on **0845 072 6780**. Lines are open between 8.30am and 5.30pm, Monday to Friday. Calls may be recorded and monitored for quality purposes. In order for us to deal with your enquiry promptly, please have the member's National Insurance number ready. Please quote the reference above, together with the member's full name, National Insurance number and the Scheme name in any other correspondence.

Yours faithfully

Steve Blackman
Head of Administration Bracknell

Enc. Member's authority
Transfer In Enquiry Form



The Pensions Trust

Transfer In - Form to accompany transfer details

When you have all the details required from your previous pension provider, please send them to The Pensions Trust with this form.

Details for you to complete

The Pensions Trust Membership Number:

Membership Number with your previous pension provider: SALLY ANN MALTHOUSE

Title: (Mr / Mrs / Miss / Ms / Other, please state): _____

Forname(s): SALLY ANN Surname: MALTHOUSE

Previous Surname (if any): _____ Date of Birth: 20 / 09 / 1969

National Insurance Number:

Home Address: 4 PARK VIEW, SYDENHAM, CHINNOR, OXON

Postcode: OX39 4LQ

I authorise The Pensions Trust to request any other details they may need from my previous pension provider.

Name and address of previous pension provider: PENSIONPRACTITIONER.COM

DAWS HOUSE, 33-35 DAWS LANE, LONDON

Postcode: NW7 4SD

Date of previous pension scheme membership:

From: 01 / 03 / 2003

To: 12 / 09 / 2014

Your Signature: S.A. Malthouse Date: 30 / 07 / 2015

The information on this form will be treated in the strictest confidence.
Personal data which is held will be processed in line with the Data Protection Act 1998.
The Data Controller is Verity Trustees Ltd.

Verity House, 6 Canal Wharf, Leeds LS11 5BQ Tel: 0113 234 5500 Fax: 0113 234 5599
Email: enquiries@thepensiontrust.org.uk or visit www.thepensiontrust.org.uk



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**SMARTER
PENSIONS**

**The Pensions Trust – Growth Plan Series 4
Transfer In Enquiry Form**

Member Details	
Name	Miss SA Malthouse
National Insurance Number	NS445378A
Sex	Female
Date of Birth	20/09/1969
Date Joined Company	
Date Joined Scheme	
Date Pensionable Service Commenced	
Date Pensionable Service Ceased	
Normal Retirement Date	
Pensionable Service	
Transferred In Service included/ excluded from the above	
Additional Voluntary Contribution Service included in the above	
Final Pensionable Salary	
Final Remuneration	
Maximum amount of cash sum at date Pensionable Service ceased	

Transferring Scheme Details	
Full Scheme Name	
ECON / SCON	
PSTR Number	
IRSPSS Reference Number	
IRSPSS Approval	

Transferring Value Details	
Transfer Value	
<i>Including value of:</i>	
Former Protected Rights / GMP Pre 6 April 1997	
Former Protected Rights / GMP Post 5 April 1997	
Transfer Value of Post 5 April 1997 excess benefits *	
Transfer Value of benefits 6 April 1997 to 5 April 2005*	
Transfer Value of benefits post 5 April 2005*	
Member's Contributions	
Member's AVCs	
Transfer Value Date	
Transfer Value guaranteed until	



* Transfer value splits are required for each tranche with different pension increases.

GMP Details			
	Pre 6/4/1988	Post 5/4/1988	Revaluation Rate
GMP at date of leaving	p.a.	p.a.	
GMP at GMP Payment Date (age 60 for females, age 65 for males)	p.a.	p.a.	
Transferred In GMP at date of leaving if not included above	p.a.	p.a.	

Receiving Scheme Details	
Full Scheme Name	The Pensions Trust – Growth Plan Series 4
ECON / SCON	N/A
PSTR Number	00281218RV
IRSPSS Reference Number	N/A
IRSPSS Approval	N/A

Receiving Scheme Bank Details - We will inform you if the transfer is to proceed. Any request for payment should be made by BACS into the trustee bank account details as follows:

Bank Name	Royal Bank of Scotland
Account Name	JLT – Re Trustees of the Pensions Trust
Account Number	22983787
Sort Code	15-10-00

Please ensure your response clearly states any documents you require and enclose any discharge forms you require completing.

Signed:

Date:

(For and on behalf of the Transferring Scheme Administrators)

