

**CLAIM FORM**

Mr Roy Keegan  
RET193832

**BENEFITS AVAILABLE**

Current Transfer Value £236,544.25

This value includes the value of all sub-accounts held in your Retirement Account and is not guaranteed.

This is a Full transfer ☒ or Partial Transfer ☐ for £

**DISCHARGE**

Payment in accordance with the request shall be a full and sufficient discharge of Prudential's liability for the benefits being transferred under the above Account.

**I understand that the transfer value will be recalculated at the date Prudential receive all their requirements to make payment and this amount could be higher or lower than the transfer value shown in this quotation.**

I authorise Prudential to contact the Receiving Scheme named below to obtain any further information they may need to facilitate the transfer.

Signature 

Date 19.11.19

Reason For Transferring:	PERFORMANCE
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**SETTLEMENT DETAILS**

Payment to be sent to:

VLP PROPERTY PENSION FUND

Wherever possible, payment will be sent to the new provider using the Banks Automated Clearing System (BACS). Please provide the bank details for the receiving scheme/provider:

Name and address of Bank:

ST JAMES'S HOUSE

CHARLOTTE STREET

MANCHESTER

Account Name:

M1 4DZ

Sort Code:

Account Number:

Pension Provider's Reference:

VLP/RK

# Transfer declaration

Please use black ink and write in CAPITAL LETTERS or tick as appropriate. Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

## About this form

Please provide us with as much information as you can.

Pension Transfer (to be completed by the receiving scheme trustees or administrator)

☒

Open Market Option (to be completed by the annuity provider)

☐

## Our details

Retirement Account Number

RET193832

Name Of Transferring Scheme

Prudential Pension Scheme

Correspondence Address

Prudential, Lancing, BN15 8GB

## Your details

Name of receiving scheme and provider

VLP PROPERTY PENSIONS FUND

Policy/reference number

RET193832

Member's name

ROY KEEGAN

National Insurance number

WL 79 51 71 D

Member's date of birth

03 08 1961

The receiving scheme is: A UK Registered Pension Scheme

☒

Or a non UK scheme

☐

Reference (to be used on correspondence and payments)

VLP/RK

HMRC ref / registration number

00818 299 RT

Please Confirm if: Cheque

☐

Or Direct Credit

☒

Cheque made payable to

Address

Postcode

Direct Credit Sort Code:

23-83-96

Account Number:

04919088

Account Payee Name:

VLP PROPERTY PENSIONS

FUND

Reference to be included with payment (e.g. client name/policy number)

VLP/RA

**Pension transfer** (do not complete for open market option)

1. We undertake that the receiving scheme is: (please tick one option only)

- a) Registered Defined Benefit Occupational Pension Scheme ☐
- b) Registered Defined Contribution Occupational Pension Scheme ☐
- c) Individual Pension Arrangement ☐
- d) Qualifying Recognised Overseas Pension Scheme (QROPS) & the Trustees/Administrator are willing and able to accept the payment ☐

**Open market option**

We confirm that the member's fund will be used to secure a non-assignable, non-commutable annuity.

Address for correspondence:

C/O SAN INVESTMENT MARKETING
105 Victoria Road, Old Town, Swindon
Postcode SN1 3B1

**Receiving scheme declaration**  
(for pension transfer)



- a) We declare that the information given above and overleaf is true and correct.
- b) We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with HMRC conditions of approval.
- c) If a non UK scheme, we:
- > are registered as a QROPS
  - > have not been excluded from being a QROPS
  - > give our authority for HMRC to give information to you about our QROPS status, and
  - > confirm the legislation of the country in which our scheme is established allows us to accept a transfer from a UK Registered pension scheme

**Annuity provider's declaration**  
(for open market option)



Where the fund originates from a trustee based pension scheme, the grantee of the policy will be the trustees of the purchasing scheme unless otherwise instructed.

Signature

X [Signature]

Date

19/11/2019

Company Name

TRUSTEES OF THE  
VLP PROPERTY PENSION FUND

Position

TRUSTEE