

Transfer Out section
St. James's Place Wealth Management
Craigforth Administration Centre
PO Box 64
Lancing
BN15 8GB

By First Class Recorded Delivery

31 December 2014

Dear Sirs,

Name: Mr. Nathan Wesley Elphick
National Insurance Number: NW852729A
Date of Birth: 21 February 1971
Plan Numbers: 93C49J55 and 93C49J98

Please find enclosed an application to transfer benefits to a registered pension scheme for our mutual customer.

I also enclose the following items which also meet the current industry initiative on external pension transfers to authorised registered schemes.

1. HMRC Notification of registration for tax relief confirming that this scheme has been registered under the new registration process and has met the declarations required for pension registration. You will note from the registration process we have undertaken "that we do not entitle either directly or indirectly to any unauthorised payments from the plan. Further, that the plan is not being administered in a way that knowingly entitles any person to unauthorised benefits".
2. The HMRC 12 point questionnaire requesting information to satisfy Pensions Liberation concerns and our reply letter.
3. Discharge and warranty forms.
4. Trust Deed and Rules.

These items fulfil the most current codes of practice also recommended by the Pensions Regulator and as such would you please settle this transfer payment.

The transfer payment should be made by **BACS** to the following account details:-

Name of Bank: Metro Bank
Account Name: Verity & Beverley Limited Pension Scheme
Account Number: 15864036
Sort Code: 23-05-80



Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com www.pensionpractitioner.com

We confirm that we are a co-signatory to above account and that the Trustees are unable to move any funds without our authority. This therefore protects the fund completely against any risks of pension liberation.

If you require any further documentation to be completed in order that the transfer can be concluded, please advise me accordingly.

Thank you in advance of your assistance

Yours faithfully

Brad Davis
For PensionPractitioner.com

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