

with compliments

David,

*find enclosed documents relating to
Martin Rossmeisen for transfer of funds
Kind regards,*

Alan



CARLTON JAMES

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Transfer Details

Name of Transferring Scheme: EMC (UK) Pension Scheme

Quotation Date: 23 January 2014

Total Transfer Value of Benefits

(This amount is variable in line with market conditions).

£ 155,089.19

Member's normal contributions (including member's contractual contributions transferred to the Scheme) included in the Total Transfer Value:

£ 138,534.68

Member's voluntary contributions (including voluntary contributions transferred to the scheme) included in the Total Transfer Value:

Total Additional Voluntary Contributions (AVCs)

£ 0.00

• AVCs that commenced Pre 8 April 1987

£ 0.00

• AVCs that commenced Post 7 April 1987

£ 0.00

Details of the alternative benefits within the Scheme are as stated in the Scheme Details Form.

This statement is based on the information currently held by the administrator of the scheme and is produced for information only. It is not proof of entitlement and confers no right to benefits. All benefits must be calculated and paid only in accordance with the trust deed and rules of the scheme and UK and European law, and are therefore subject to review before payment.

Please note that Mercer Limited is acting according to its duty as administrator of the transferring scheme and does not profess to offer any advice in respect of the member's personal circumstances.

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23 January 2014

Mr M Rasmussen

EMC (UK) Pension Scheme

9105199

Member Name: Mr M Rasmussen	
Last known address: 162 Middle Drive Ponteland Newcastle Upon Tyne NE20 9DT	
Date of Birth:	16 August 1967
Date of Birth Verified:	No
Marital/Registered Civil Partnership Status:	Unknown
Membership Class:	150% of Basic Salary election
National Insurance Number:	SC060583D
Date employment commenced:	1 February 2011
Date Contracted Out employment commenced:	
Date pensionable service commenced:	1 February 2011
Date pensionable service ended:	15 July 2013


For and on behalf of the administrator

.....
Date

Declaration By Personal Pension Scheme:

TICK BOX

We hereby certify that:

1) The Personal Pension Scheme is a registered pension scheme under section 153 of the Finance Act 2004

☐

2) The Personal Pension Scheme is underwritten by a Life Office

☐

3) The Personal Pension Scheme is partly non-insured or no Life Office is involved.

☐

The Personal Pension Scheme is able and willing to accept the Transfer payment and will use it to provide money purchase benefits for and in respect of the member.

☐

Signed:.....

Date:

Full name of Authorised Signatory:.....

Position of Authorised Signatory:

Personal Pension Provider's official Stamp:

Personal Pension Scheme Transfer Declaration Form

Transferring Scheme Details:

Scheme name: EMC (UK) Pension Scheme

Member's name: MR M RASMUSSEN

National Insurance number: SC060583D

Total Transfer payment to be paid to the Personal Pension Scheme: £ 155,089.19

Personal Pension Scheme Details:

Full name of Personal Pension Scheme Provider:

Name of Personal Pension Scheme:.....
(Hereinafter called "the Personal Pension Scheme".)

Address of the Personal Pension Scheme:

.....

.....

.....

Pension Scheme Tax Reference:.....:

Evidence of registration by Her Majesty's Revenue & Customs (HMRC) must be attached.

Payee in respect of Transfer payment:.....

.....

(If the Personal Pension Scheme is underwritten by a Life Office the payment must be made to the Life Office.)

Form D1:

To be signed by the receiving scheme if the member is not using an IFA

In connection with this proposed transfer, please note that:

- Mercer is acting solely in its capacity as administrators of the EMC (UK) Pension Scheme and is therefore not arranging any transactions in investments.
- Mercer is not involved in individual pension transfer business of any type. This transfer of pension benefits to (insert name of scheme)must not be assigned to Mercer's agency.

Mercer is not acting as agent for the arrangement and will not receive any commission.

To enable me to pay the transfer value, please acknowledge receipt and acceptance of the terms set out by completing this form and returning it to:

Mercer
Westgate House, 52 Westgate, Chichester, PO19 3HF

Transferring scheme name: EMC (UK) Pension Scheme

Receiving scheme name:

Transfer of benefits in respect of (insert member name).....

We, the undersigned, confirm that we understand and accept the terms and conditions as described above.

Print Name:

Signed:

Position:

Address:

.....

.....

Date:

Transfer checklist

Transfer from : EMC (UK) Pension Scheme

In respect of : Mr M Rasmussen

NI number : SC060583D

Transferring to :

I confirm the following documents are attached:

Application to proceed with transfer of benefits form signed by the member. ☐

Declaration Form(s) signed by (Trustees/Insurance Company). ☐

Member's original Birth Certificate (and Marriage Certificate if applicable). ☐

The original statement of benefits sent to the member. ☐

OR

A letter signed by the member confirming the statement is *no longer* in their possession. ☐

Evidence of registration by HMRC. ☐

A copy of the Contracting-out Certificate (if applicable) including the relevant ECON and SCON numbers. ☐

Advice Disclaimer ☐

Receiving scheme policy / reference number

Receiving scheme payment details completed below. ☐

(To be completed by advisor/trustees/provider)

Payee:

Bank: Branch:

Sort Code: Account Number:

Reference:

Failure to provide the information requested will result in delays in the transfer.

Name of the Scheme Administrator for the purposes of Section 270 of the Finance Act 2004:

.....

Scheme Administrator ID as provided by HMRC:

.....

***delete as appropriate**

Signature(s):..... Date:

Full name(s) of authorised signatory(s):.....

Position of authorised signatory(s):

Ref: 9105199

Occupational Pension Scheme Transfer Declaration Form

Member name: Mr M Rasmussen

National Insurance Number: SC060583D

Transfer payment: £155,089.19

To: Mercer Limited
Westgate House, 52 Westgate
Chichester PO19 3HF

The trustees of (the receiving Scheme) confirm:

The Receiving Scheme is a registered pension scheme under section 153 of the Finance Act 2004*

Evidence of registration by Her Majesty's Revenue & Customs (HMRC) must be attached.

The Receiving Scheme is an insured scheme.*

The above named is a member of the Receiving Scheme and will be entitled to benefits in respect of the transfer payment as agreed between the member and the trustees of the Receiving Scheme.

We agree to treat £ per annum as 'Guaranteed Minimum Pension' for the purposes of the Pension Schemes Act 1993. The Guaranteed Minimum Pension will be revalued [in line with section 148 orders] [at fixed rate] [at limited rate]*.

We undertake that any transfer benefits provided in respect of contracted-out employment from 6 April 1997 will be in the same form as those provided for our scheme's own contracted-out members.*

The member is/is not* in contracted-out employment and the Receiving Scheme is able and willing to accept any contracted-out liability

Receiving Scheme ECON: Receiving Scheme SCON:

If the receiving scheme is contracted out, a copy of the contracting-out certificate must be attached.

We authorise HMRC to provide Mercer Limited, as the administrators of EMC (UK) Pension Scheme, with any information they require in their investigation of the registration status of

The Pension Scheme Tax reference number of is

Signature:  Date: _____

Full name: MARTIN RASMUSSEN

IN BLOCK CAPITALS PLEASE

Ref: 9105199

Application to transfer benefits

To: **The trustees of EMC (UK) Pension Scheme**

Member name: **Mr M Rasmussen**

I want to transfer the value of all my benefits to (the receiving arrangement) instead of leaving those benefits, including any legal right I may have to a cash equivalent, in the pension scheme.

Please apply the transfer value (see note below) of my benefits in the pension scheme to secure benefits in the receiving arrangement. I acknowledge that when you pay the transfer in line with my request you will no longer be responsible for providing any benefits for or in relation to my membership of the pension scheme.

I understand that the benefits I will eventually receive from the receiving arrangement may be more or less than the benefits that I would have received from the pension scheme.

I acknowledge that you will not be responsible for the amount or type of benefits that will be provided by the receiving arrangement in return for the above transfer value.

I confirm that I am not transferring my benefits to a 'pension liberation' arrangement in order to access my benefits in any way that conflicts with Her Majesty's Revenue & Customs' requirements. I understand that were I to do so, I would be liable for the tax charges that Her Majesty's Revenue & Customs would levy on me. (If you have any concerns that the arrangement into which you are intending to transfer your benefits may be a 'pension liberation' arrangement, please see the Pension Regulator's website at:
<http://www.thepensionsregulator.gov.uk/regulate-and-enforce/pension-liberation.aspx>.)

Where the transfer includes a transfer of GMP and / or section 9 (2B) rights to a contracted in occupational pension scheme or to a personal pension scheme, I confirm that:

- I have received a statement from the receiving arrangement showing the benefits to be awarded in respect of the transfer payment, and
- I accept that the benefits to be provided by the receiving arrangement may be in a different form and of a different amount to those which would have been payable by (enter reference / prompt to transferring scheme here) and that there is no statutory requirement on the receiving arrangement to provide survivor's benefits out of the transfer payment.

Note: The transfer value in relation to your benefits in the pension scheme will be the value of those benefits at the date the transfer payment is made. This may be more or less than the amount we originally worked out.