**Bespoke Pension Services Limited**

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**DESIGN AND ADMINISTRATION OF SPECIALIST PENSIONS**



**BESPOKE** PENSION SERVICES

Transfer out Section  
Legal and General Assurance Society Ltd  
Individual Pensions Claims Team  
City Park  
The Droveway  
Hove  
BN3 7PY

**By First Class Recorded Delivery**

18 June 2014

Dear Sirs,

**Member: Ms Penelope Jane Bailey  
Date of Birth: 09 October 1968  
National Insurance Number: NR252176D  
Plan Number: UP2490903**

Please accept this letter as a request for the transfer of the above policy to WADT Pension Scheme and a confirmation that WADT Pension Scheme is able to accept the transfer including any Protected Rights.

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

1. Letter from HMRC 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 their letter that we undertook “*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. Please find enclosed your Discharge Forms duly completed and signed.
3. The scheme’s Trust Deed and Rules.

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

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

**Name of Bank: Church House Trust  
Account Name: WADT Pension Scheme  
Account Number: 33130367  
Sort Code: 60-95-31  
Reference: 3301-30367-1**

Please note that this scheme and has been tax registered on 10 June 2014 and that the application for submission for the tax registration was applied for post 21 October 2013.

The registration has therefore been confirmed by HMRC under their new pensions liberation check basis and HMRC have already carried out all of their required checks under their new registration system.

It will therefore not be necessary for the ceding scheme to reconfirm the current status of the scheme with HMRC before completing the transfer

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

Please acknowledge safe receipt and that the documentation is all in order.  
Thank you for your assistance in this matter.

Yours faithfully

Michelle Lunnon  
**For Bespoke Pension Services**

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