

**Our Reference:** KS\_/TF00528693

SSAS Practitioner.com Limited  
Daws House  
33-35 Daw Lane  
London  
NW7 4SD

6<sup>th</sup> January 2017

Dear Sirs

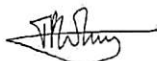
**Re: Simon Welch - WIPS/M1/SW**

I write further to your letter regarding the transfer of the above client's Pension with Transact to your management.

Please accept this as confirmation that an amount of £132,711.16 was transferred on 06/01/2017 to the bank account details provided.

I trust that this information will suffice, but should you require any further information, please do not hesitate to contact a member of the Client Service Team on (020) 7608 5370.

Yours faithfully



**Tom Gray**

Regional Client Operations Manager

Mr S Welch  
Long Acre  
Stone Lane  
Lydiard Millicent  
Swindon  
Wiltshire SN5 3LD

6 January 2017

Portfolio number: 789-757-474

Dear Mr Welch,

**Statement of Transactions**

Please find enclosed a statement containing your Transact - SIPP transactions for the period 6 April 2016 to 6 January 2017.

Should you require further information or assistance please contact your financial adviser Timus Little on 01793 611 126. Alternatively you may contact me or one of our team on (020) 7608 5370 or send us a secure email via the Transact website [www.transact-online.co.uk](http://www.transact-online.co.uk).

Yours sincerely,



**Tom Gray**  
**Regional Client Operations Manager**

Enc: Statement of Transactions

Mr S Welch  
6th January 2017

Portfolio No: 789-757-474  
Adviser: Timus Little

### Transaction Listing from 6<sup>th</sup> April 2016 to 6<sup>th</sup> January 2017

#### SIPP

#### Cash Transactions

Date	Transaction Details	Payments	Receipts	Balance
29/11/2016	Deposit - Transfer from Standard Life Investments Ltd	£0.00	£147,458.40	£147,458.40
01/12/2016	Annual Commission - Transact	£2.86	£0.00	£147,455.54
01/12/2016	Interest	£0.00	£1.31	£147,456.85
06/01/2017	Closing Balance	<b>(£2.86)</b>	<b>£147,459.71</b>	<b>£147,456.85</b>

There are no investment transactions within the specified date range in this Wrapper.

#### Transactions Awaiting Completion

06/01/2017 Rollout - Cash (Instruction Received) of £132,711.16

## SIPP Transfer Form

### CLIENT INFORMATION:

Full Name	Simon Welch
Permanent Address:	Long Acre Stone Lane Lydiard Millicent Swindon Wiltshire SN5 3LD
Date of Birth (dd/mm/yyyy)	14/11/1956
NI number	WE908200D
Transact Portfolio No.	789-757-474
Date of Joining Scheme	30/09/2016
Valuation Date	06/01/2017

### SCHEME INFORMATION

Scheme Name	SIPP (Accrual)
PSTR Number	00720366RQ
Type of Scheme	Money Purchase
Governing Legislation	Finance Act 2004

### TRANSFER PAYMENT INFORMATION:

Amount of Total Transfer: Cash	£132,711.16
Amount of Total Transfer: In-Specie	£0.00
Pension State	Accrual
Has member flexibly accessed pension	No
Date benefits flexibly accessed	N/A

### DECLARATION:

- We have fulfilled all our obligations to the SIPP investor, the HMRC or otherwise, which are imposed by the SIPP regulations.
- We have transferred to you or your nominee any SIPP investments, held in the clients SIPP at the time of transfer.

Signed: .....  ..... Date: 06/01/17.

For and on behalf of Integrated Financial Arrangements Ltd