



InvestAcc

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Whittingham SSAS
Retirement.Capital – RC Administration Limited
1A Park Lane
Poynton
Cheshire
SK12 1RD

20 December 2023

Dear Sirs,

SIPP Lite

Membership: Mr James Mark Whittingham (6279)

National Insurance Number: JP 27 79 26 C

I can confirm the total transfer value for the above member's scheme is £97,726.07.

Please find below the following details:

1. The transfer is made up of an in-specie transfer of £97,726.07 from Interactive Brokers.
2. The money arises from a Registered Pension Scheme for the purposes of Part 4 of the Finance Act.
3. Our Pension Scheme Tax Reference Number is 00605996RN.
4. The transfer consists of uncrystallised arrangements to the value of £97,726.07.
5. **25% tax-free cash** is available on the uncrystallised funds noted above.
6. As far as we are aware, no part of the transfer value is subject to any court order relating to divorce or bankruptcy.

If you have any queries, please do not hesitate to contact me.

Yours faithfully,

Katie Lawson

SIPP Administrator

✉ katie.lawson@investacc.co.uk

CC. Mr JM Whittingham
CC. Fixmypension.com



www.investaccpensions.co.uk

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