



AVIVA

| Retirement | Investments | Insurance | Health |

Retirement Capital
Venture Wales Building
Merthyr Tydfyl Industrial Business Park
Merthyr Tydfyl
Wales
CF48 4DR

22 October 2020

Dear Sir or Madam

Transfer for Pension

We've been asked to set up a transfer for Mr Greenhough using money from a plan currently held with you. Should you require additional authority from our mutual client, we ask you request this from them directly to ensure there are no blockages to their transfer journey.

Important information

We're unable to accept transfers from plans which have any crystallised benefits.

We will not be able to accept transfers from plans which have any of the following benefits:

- Defined Benefit policies
- Defined Contribution policies with safeguarded rights
- Defined Contribution policies with guaranteed annuity rates
- Defined Contribution policies with a guaranteed income (including some Retirement Annuity Contracts)
- Any other guaranteed benefit that will be lost on transfer
(for example a guaranteed with-profit fund).

If the plan has any of these, please let us know as soon as possible – We will reject the transfer if it contains any benefits of these benefit types

I've enclosed a digital declaration by Mr Greenhough asking for the transfer payment to be made.

Our pension details

The transfer will be to an Aviva personal pension scheme.

It's registered under part 4 of the Finance Act 2004.

We do not accept enhanced transfer values.

The scheme certificate number is A7001055E.

The pension scheme tax reference is 00605426RG.

Any questions?

You can contact us on

Tel: 0800 285 1088

Open: 8am to 6:30pm

Monday to Friday and

9am to midday on Saturday

We may record or monitor your call

Or you can email us:

**myinvestmentportfolio
@aviva.com**

Our reference is:

AV2567764

Visit our web site at

aviva.co.uk

Account number

AV2567764

Client name

Mr Philip Greenhough

Your reference number

04690077

Transfer Value

£74805.77

Enclosed

- Digital declaration
- HMRC certificate

OBC1003

Transfer payment

When you send us the transfer payment, please let us know the following:

- Total transfer value.
- Type of plan being transferred.
- Pension scheme tax reference number for the transferring scheme.
- Total percentage of tax-free cash available at retirement from this plan.

We'll need all these details in writing.

Sending us the money

You can pay the transfer money to us by TT or BACS using the details shown below.

If paying by BACS or TT please send the payment to:


- **Account number:** 21357719
- **Sort code:** 40-02-50
- **Reference:** AV2567764
- **Bank name:** HSBC
- **Bank address:** City of London Corporate Office
PO Box 125
Canada Square
London
E14 5XL

Declaration

On behalf of Aviva, I declare the information above is true, accurate and complete. I confirm we are willing to accept payment and understand that on completion of the transfer you will be discharged by Mr Greenhough of all liabilities relating to your pension plan.

We're here to help

We'll be happy to help if you have any questions. Please call us on **0800 285 1088**.

Yours faithfully

David Tear
Investment Support Team



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User Name: (A0143385)

PSTR 00605426RG

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Current scheme details

Pension Scheme Name AVIVA PERSONAL PENSION SCHEME
Deferred annuity contract / Retirement No

annuity contract made after 5 April

2006

Date scheme registered 05 Apr 2006

Name of Scheme Administrator who Aviva Pension Trustees UK Limited
registered the scheme

Scheme status	Open
Sub-scheme	No
Pension scheme structure	Single
The scheme is an investment regulated pension scheme ?	Yes
Band of number of scheme memrs	10001+
Registered for Relief at source	No
Occupational pension scheme ?	No
Country or Territory scheme established	UNKNOWN

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