254 Berglen Court 7 Branch Road London E14 7JZ

FAO - Esther Salmon Office 12 Venture Wales Building Pentrebach Merthyr Tydfil Wales CF48 4DR

25 November, 2020

Reference: Transfer Documents for Stephen Heath Scottish Friendly Policy

Dear Esther

Please find enclosed the transfer documents for my Scottish Friendly pension scheme.

This is in relation to our SSAS, which is currently managed by Retirement Capital.

We enclose the original insurance certificate for this policy when it was Albany Life.

Kind regards

Stephen Heath

c.c. Liam Hillier - Opportunity10

Below are the two options available. Please tick one box to confirm what option you have chosen.	
Move to another provider without taking any tax free cash*	
Move my pension funds to another provider and Scottish Friendly to pay my tax free cash* (please insert your bank details on the personal details page so we can pay you your tax free cash	
allowance.	
I enclose my original Policy Document	
I have lost my original policy document. I confirm that I am the legal owner of the policy stated above but that I no longer hold the original policy document and will provide proof of identification when submitting this form.	
Please refer to the attached acceptable list of identification that we can accept.	
The Scottish Friendly Assurance Society Personal Pension Plan has been approved as a personal pension scheme for the purposes of Chapter IV Part XIV of the Income and Corporation Taxes Act	

pension scheme for the 1988.

Reference No.: SF87/118/1

7	
Signature	Date 25 NN 2820

Below are the two options available. Please tick one box to confirm what option you have chosen.
Move to another provider without taking any tax free cash*
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Reference No.: SF87/118/1

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Signature	
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Receiving scheme details

Before we proceed with the transfer we require the new receiving scheme to confirm in writing that they will accept your funds. They must supply their Bank details and unique Pension Scheme Tax Reference (PSTR). Please ask them to provide this. Your transfer will not be processed until these details are received. Please ask for the following to be completed in and returned.

Full name of receiving	Scheme:
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Full Address of receiving Scheme

.....

Pension Scheme Tax Reference of receiving scheme.....

Bank details of receiving scheme:

Account name
Sort Code
Account Number
Payment reference

To be completed by the receiving scheme:

I can confirm that we accept the transfer of policy(s)
Signature
Date

Head office Scottish Friendly House, 16 Blythswood Square, Glasgow G2 4HJ *Telephone* 0333 323 5433 *www.scottishfriendly.co.uk*

The Scottish Friendly Marketing Group consists of the following companies:

Scottish Friendly Assurance Society Limited – Life, Savings and Investments. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Member of AFM, Member of ABI. Scottish Friendly Asset Managers Limited – OEIC Managers, ISA Managers. Authorised and regulated by the Financial Conduct Authority. The Investment Association. Registered in Scotland No 187215. Scottish Friendly Insurance Services Limited – Authorised and regulated by the Financial Conduct Authority. Registered in Scotland No 113007. SFIS (Nominees) Limited – Registered in Scotland No 397351.

Personal Details

Tick (please t	ick one)	
Mr		Ms	Other 🗌
Mrs		Dr	

Forename	
Surname	

Policy Number(s)	
National Insurance Number	
Date of Birth	
Address	
Email Address	
Postcode Email Address	
Contact Number	
Bank Details: Name of Bank:	
Account No:	
Sortcode: Account NO.	

Account Name:....