

Scottish Widows  
PO Box 24171  
69 Morrison Street  
Edinburgh  
EH3 1HL

**Private & Confidential**

Ms C Hunt  
38 Kingsway  
Petts Wood ORPINGTON  
Kent BR5 1PS

15 November 2021

Tel No: 0345 755 6557  
Fax No: 0131 655 7004

Our Reference: 7017016

Dear Ms Hunt

Policy Number:	7017016
Policyholder:	Ms C Hunt
Scheme Details:	P000079040 - CARE UK
Policy Type:	Group Personal Pension Plan

Please find enclosed the following information as requested.

- \* A quotation of transfer value benefits
- \* A declaration of claim discharge form

To take one of the transfer quotation options please follow the instructions given in the enclosures detailed above. Please note that any protection may be lost upon transfer.

If you're 50 or over you should also consider getting free and impartial guidance on your options by contacting Pension Wise at: <https://www.pensionwise.gov.uk/>

All valuations quoted are for information purposes only and cannot be guaranteed.

You can visit our website [www.scottishwidows.co.uk](http://www.scottishwidows.co.uk), which contains a variety of useful information.

If you have any queries or need further information please call us on the above helpline number.

We are able to provide policy information via email, if required. This will be sent using a secure email system which does not require any additional software to receive.

Yours sincerely

**Masood Shaikh**

Masood Shaikh  
Corporate Pensions

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**Quotation of Transfer Value Benefits**

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<b>Pension Plan</b>	7017016 - Ms C Hunt
<b>This quotation was produced on</b>	15 November 2021
<b>Quotation of transfer value on</b>	12 November 2021
<b>Value of Units</b>	£21,863.45
<b>Total Transfer Value</b>	£21,863.45

**Notes**

Please note that where you qualify for a protected retirement age or where you have protected tax free cash this may be lost on transfer. If you have applied to HM Revenue and Customs for Enhanced Protection, this may be lost if the transfer is not a permitted transfer. Please seek financial advice.

All values shown in this quotation are based on the latest information available to Scottish Widows. The actual transfer value will include all contributions received before the date of transfer.

This quotation assumes that the last premium paid was £1,360.00 gross on 19 April 2015.

The values in this quotation are not guaranteed. The actual value paid will be calculated using the unit values on the day after Scottish Widows receives the final documents required for payment.

## Declaration of Claim Discharge

Policy Number(s) : 7017016  
 Policyholder's Name : MS C HUNT

### A. Transfer Instructions

If you choose to transfer to another approved pension provider please complete Section E overleaf and ask the Trustees/Administrators of the receiving Scheme/Life Office to complete Section C below.

### B. Transfer Value Details

Total amount of transfer value £21,863.45

The total amount of transfer value is not guaranteed. The actual transfer value paid will be calculated on the day after the final documents required for payments are received at Scottish Widows head office (please see policy provisions for further details). Remember that unit values can go down as well as up, so the final amount may be less than the amount quoted above.

While contributions continue, we are unable to process your request to transfer your benefits. You must therefore confirm with your employer and advise us of the date your final contribution will be paid in order for this transfer to proceed.

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### C. Receiving Scheme/Life Office Details

Notes : a) if you would rather receive payment by cheque, please complete your company name and address in the fields below

To be completed by the Trustees/Administrators of the Receiving Scheme/Life Office.

Name of Receiving Scheme/Life Office.....  
 (The cheque will be made payable to this name)

Address of Receiving scheme.....

..... Post Code .....

A/c Name.....A/c Number.....Sort Code.....

Reference to be Quoted.....  
 (if blank National Insurance Number will be quoted)



The transfer value will be paid to:

☐

A registered pension scheme as defined by Part 4 of the Finance Act 2004

Please tick

If the transfer is going to a retirement benefits scheme or a statutory scheme,  
please state the normal retirement age for the scheme.

☐

Please provide your Pension Scheme Tax Reference.

We agree to accept the transfer as indicated above.

Signed ..... Date .....

Title/Designation .....  
(for the Trustees/Administrators of the Receiving Scheme/Life Office)

#### **D. Notes**

- You may lose any protected tax free cash on transfer.
- If the scheme has applied to HMRC for a protected retirement age, this may be lost on transfer.
- If you have applied to HMRC for Enhanced Protection this may be lost on transfer.
- If you have applied to HMRC for a protected retirement age, this may be lost on transfer.

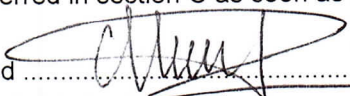
Should you have any queries relating to the above please seek financial advice.

#### **E. Signature**

**Complete this section in all cases.**

I authorise the transfer to the Scheme/Life Office as detailed overleaf.

This authority will act as my discharge to Scottish Widows in respect of the amount requested to be transferred in section C as soon as the cheque is paid to the receiving Scheme/Life Office.

Signed  ..... Date 21/11/21  
(Policyholder's signature)