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Sandford Gate
Eastpoint Business Park
Oxford
OX4 6LB

Hi Esther,

Please find enclosed transfer out forms for Martyn Spackman. Should you have any queries please do not hesitate to contact me.

Yours sincerely,

Jamie Murray
Director
Lawbox Group Ltd

Please note: Lawbox and Lawbox Design are trading names of Lawbox Group Ltd which is a legal business management and compliance consultancy. Lawbox Group Ltd is a registered company in England and Wales with registration number 10694449.

join the box.

Aviva Platform –

Pension Portfolio Discharge Form



Part A – to be completed by the customer

Account Number

AV200645 2/001 AND AV200 645 2/002

Full Name

MARTYN JOHN SPACKMAN

Current Address

77 ROSE HILL

OXFORD

Postcode OX4 4JR

To help speed up payment of your transfer we may need to contact you for more information. If you are happy for us to do this by telephone, please provide us with your telephone number. We may also ring you to get your views on our service.

Phone No (evening)

07503 088 520

Phone No (daytime)

07503 088 520

Email Address

martyn.spackman@gmail.com

Please cancel the above numbered account and transfer the benefits accrued to or in respect of me to the scheme detailed in PART B of this discharge form.

DEFERRED/SUSPENDED FUNDS – this only relates to Cash Transfers

If any funds that are invested in are either suspended or deferred from dealing or settlement, these will be exempt from this authority. Once these funds are removed from suspension or deferral, a new discharge request must be made if the transfer is still required.

I authorise payment of the transfer value to the receiving scheme, details of which the receiving scheme administrator has completed in Part B.

On payment of the transfer value to the receiving scheme, I agree that:

- where the payment to the receiving scheme represents all of the funds under any policy in Part A, then Aviva is discharged from its obligation to make any further payments under that policy, and
- where the payment to the receiving scheme represents only part of the funds under any policy in Part A, then Aviva is discharged from its obligation to make any further payments in respect of that part of the policy or policies represented by the payment.
- Any payment does not discharge Aviva for any act/error in dealing with the plan.

Signature

Date

06/12/2021

Note: Upon completion of Part A, please send this form to the administrator of the receiving scheme.

Part B – to be completed by the administrator of the receiving scheme

Name of Scheme

Administrator

Address

Postcode

SCHEME REGISTRATION

Registered under Part IV of the Finance Act 2004.

● Her Majesty's Revenue & Customs Registration Number

or

● Inland Revenue SFO Reference Number

Please circle which type of transfer is to take place

Bank details for transfer payment

Please complete details of the bank to which we can send the payment by Direct Credit Transfer.

NOTE: THIS CAN ONLY BE TO ANOTHER PENSION PROVIDER

Sort Code

Account Number

Account Name of Receiving Scheme

Reference

Bank Name and Address

Postcode

Note to administrator of receiving scheme: Upon completion of Part B, please send this form to Aviva Client Services, PO Box 26957, Glasgow, G2 9DS.

Retirement | **Investments** | Insurance | Health |

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Authorised and regulated by the Financial Conduct Authority. Firm Reference Number 465132.

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For customers

Transfer-out warranty

About this form

Complete this form to transfer benefits from your Aegon One Retirement account or Aegon Retirement Choices Self Invested Personal Pension (SIPP) to another UK registered pension scheme.

It is made up of two parts:

- Part 1 - Your pension plan details
- Part 2 - Receiving scheme - to be completed by the scheme receiving the transfer payment

Please complete this form in BLOCK CAPITALS and ball point pen and return it along with any additional information to Platform Client Services, Aegon, SUNDERLAND, SR43 4DL.

Part 1 - Your pension plan details

1. Investor details

Investor number	Date of birth
20872845	1 0 1 0 1 9 5 5
Title	Phone number
Mr	
Surname	Email address
Spackman	
Forename(s)	We'll only use your email address or phone number to contact you about your instruction.
Martyn	

)

National Insurance number

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You should be able to find your National Insurance number on a payslip, from a P45 or P60, or a letter from HMRC.



2. Pension plan details

Wrapper number(s)

71351906

Valuation date

06/12/2021

Uncrystallised

Pension fund*

£3,011.09

Please select if you wish to make a full or partial transfer:



Full transfer



Partial transfer of

£

Drawdown pension

Pension fund*

£3,011.09



Full transfer - only full transfers are permitted from drawdown wrappers

*This is the value as at the valuation date shown. These values are not guaranteed. None of the benefits from this transfer are subject to an 'earmarking' order.

3. Aegon Self Invested Personal Pension scheme details

Pension Scheme Tax Reference (PSTR) number

00773956RC

This payment comes from a scheme that is registered under Chapter 2 of Part 4 of the Finance Act 2004.

4. Investor declaration

I request that Aegon pay the current value of the benefits in my Aegon pension plan as detailed in section 2 to the receiving scheme indicated in section 5 below.

I confirm that this payment represents a full discharge of the benefits indicated and Aegon will have no further liability or obligation in respect of the transferred investments.

I confirm that I have read the enclosed pension scams leaflet from The Pensions Regulator.

Date

06 11 2021

Investor Signature

X  X

Part 2 - Receiving scheme

For receiving scheme use only.

Sections 5, 6 and 7 below should be completed by the receiving scheme provider. If you're registered as an Origo provider please submit your transfer request to Aegon Platform (Aegon Retirement Choices, Retiready, and One Retirement) using this facility.

If you're not registered as an Origo provider then please complete sections 5, 6 and 7 below and return the full warranty to us.

5. Receiving scheme details

Member's name

Name of scheme

National Insurance number

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Plan number (if known)

- ☐ We undertake that the receiving scheme is a UK registered pension scheme. This is a scheme which is registered by HM Revenue & Customs (HMRC) under Chapter 2 of Part 4 of the Finance Act 2004 (including schemes that automatically acquired this new registered status on 6 April 2006). The HMRC reference is

SF

/PSTR

A UK registered pension scheme could include:

- a new employer's occupational/stakeholder pension scheme (if that scheme is willing to accept the transfer);
- a personal/stakeholder pension plan, or
- an insurance policy known as a 'Section 32' or 'Buy-out' policy.

- ☐ We enclose a copy of the HMRC certificate confirming the receiving pension scheme's PSTR.

6. Payment details

Payments made to other insured schemes will only be made to the provider/insurer.

Name of pension provider

Address of pension provider

Postcode

Account name

Bank name and address

Postcode

code

 - -

Account number

Payment reference

Payments will be made by BACS. If alternate arrangements are required please speak to one of the Client Services Team on 0345 680 1234 (call charges will vary).

7. Receiving scheme declaration

We declare that the receiving scheme is prepared to accept the transfer payment and that it will be used to provide appropriate retirement benefits within the receiving arrangement.

I/We confirm that the information given in Section 5 is complete, accurate and true to the best of my/our knowledge and belief.

Date

Print name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Position

Company stamp

Signed for on behalf of the receiving scheme

X		X	7		7
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EGON

Aegon is a brand name of Scottish Equitable plc (No. SC144517) and Aegon Investment Solutions Ltd (No. SC394519) registered in Scotland, registered office: Edinburgh Park, Edinburgh, EH12 9SE. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Aegon Investment Solutions Ltd is authorised and regulated by the Financial Conduct Authority. Their Financial Services Register numbers are 165548 and 543123 respectively.

MULT 386043 11/19