

Transfer-out warranty

This form lets you transfer your Retiready Pension to another registered pension scheme.

This form has two parts:

Part 1 – Your Retiready Pension plan details. The Retiready Pension planholder should fully complete this section, sign it, then send the whole form to the pension scheme that the transfer is being made to.

Part 2 – The receiving scheme should fully complete this section and return the form to:
Retiready Support, Platform Client Services, Aegon, Edinburgh Park, Edinburgh,
EH12 9SE.

Please complete this form in **BLOCK CAPITALS** and ballpoint pen.

Part 1 – Your Retiready Pension plan details

1. Your personal details

Retiready account number

20515434

Title

Mr/Mrs/Miss/Ms/Other – please specify

Mr

Full forename(s)

Simon

Surname

Bushell

Date of birth (dd/mm/yyyy)

2 6 0 9 1 9 5 5

National Insurance number

Y Y 2 5 2 8 4 4 A

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

Phone number

07948625798

Email address

simon.bushell1@icloud.com

We will only use your email address or phone number to contact you about your instruction.

2. Transfer details

Retiready Pension plan number

70979870

Current plan value*

£28,673.86

Date of valuation (dd/mm/yyyy)

26/02/2021

I want you to make a: (please choose one option)

☒ full transfer of the amount shown above.

☐ partial transfer of

£

*The plan value isn't guaranteed, so you could get back less than the amount you originally invested. If you ask for a full transfer, we'll transfer the full amount of the plan value on the date of transfer. If you ask for a partial transfer, we'll transfer the amount you have indicated, unless the plan value is lower than that amount. In that case, we'll transfer the full plan value.

3. Retiready Pension (Aegon Self Invested Personal Pension Scheme) details

Pension Scheme Tax Reference (PSTR) number

00773956RC

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

4. Planholder declaration

I request that Retiready pay the value of the benefits detailed in Section 2 to the receiving scheme indicated in Section 6.

I confirm that this payment represents a full discharge of the benefits indicated and Retiready 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 (dd/mm/yyyy)

08/03/2021

Planholder signature

X  X

Part 2 – Receiving scheme

For receiving scheme use only.

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 and 6 below and return the full warranty to us.

5. Payment details

Payments will only be made to the trustees/provider of the receiving scheme.

Name of pension scheme

Adobie Family SSAS

Address of pension scheme

1A Park Lane, Poynton, Cheshire

Postcode SK12 1RD

Bank account name

Adobie Family SSAS

Bank account name and address

Adobie Family SSAS

Four Hardman Street, Spinningfields

Manchester Postcode M3 3HF

Sort code

2 3 – 8 3 – 9 6

Account number

0 4 9 1 9 0 8 8

Payment reference

S Bushell Aegon

Payments will only be made by BACS.

6. Receiving scheme declaration

Please note that we require a copy of your PSTR Certificate.

Member's name

Simon Philip Bushell

National Insurance number

YY252844A

Name of scheme

Adobie Family SSAS

Plan number if known

N/S

I/We confirm that the receiving scheme is a UK pension scheme registered with HM Revenue & Customs (HMRC) under Chapter 2 of Part 4 of the Finance Act 2004. The HMRC reference is:

SF

PSTR

20003709RK

I/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 is accurate to the best of my/our knowledge and belief.

Date (dd/mm/yyyy)

Print name

Georgina

Position

Martin

Signed for and on behalf of the receiving scheme

X

X

Company stamp

RC Administration Ltd
1A Park Lane
Poynton
Cheshire
SK12 1RD
Company No: 12409200

Retiready and Aegon are brand names 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.

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RETR271539 07/17

WHAT TO DO NOW

If you wish to accept the Transfer Value, please complete the authorisation and sign it in the presence of a witness.

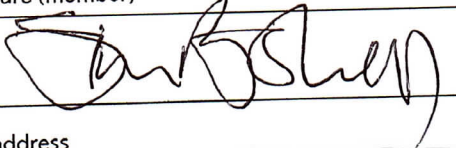
Please return the completed form to Prudential as soon as possible.

You also need to pass the following letter and Declaration to your chosen alternative pension provider to whom you wish to transfer the value of your benefits.

AUTHORISATION TO PAY

I authorise the Prudential Assurance Company Ltd to pay the Transfer Value as at the date of payment, in full discharge and satisfaction of any obligation on the part of Prudential to give effect to all the Benefits in respect of the Prudential Personal Pension Scheme.

Signature (member)

X 

Date

D	D	M	M	Y	Y	Y	Y
0	8	0	3	2	0	2	1

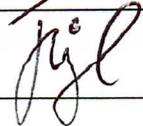
Your address

262 PARK LANE, MACCLESFIELD, CHESHIRE
Postcode SK11 8AA

WITNESSED BY

Please note that the witness must not be a member of your family, or someone who lives with you.

Signature

X 

Date

D	D	M	M	Y	Y	Y	Y
0	8	0	3	2	0	2	1

Full name

JONATHAN PAUL WIGMORE

Address

253 Park Lane Macclesfield
Postcode SK11 8AA

0345 640 2000
8am to 6pm - Mon to Fri
Calls may be monitored or
recorded for quality and
security purposes.

Member's name: Simon Bushell
Member's date of birth: 26 September 1955
Our reference: CAP/P KERKAR
Territory details: I 74 2984
Date of quotation: 25 February 2021

PRUDENTIAL PERSONAL PENSION SCHEME

TRANSFER VALUE ACCEPTANCE AND AUTHORITY TO PAY

Please use black ink and write in CAPITALS or tick ☒ as appropriate. Any corrections must be initialed. Please do not use correction fluid.

If you have any questions about this form, you can call us on 0345 640 2000, 8am to 6pm Monday to Friday. Calls may be monitored or recorded for quality and security purposes.

Please return this form to:
Prudential, Lancing, BN15 8GB

MY ACCEPTANCE

I understand that the Transfer Value is not guaranteed and is based on the last premium paid being that due 1 May 2005, and the amount payable will be calculated at the date of payment.

TRANSFER MY FUND TO ANOTHER PENSION PROVIDER



Pay the Transfer Value as at the date of payment into the scheme named below. (This must be either a UK Registered Pension Scheme or a Qualifying Recognised Overseas Pension Scheme.)

The transfer will be made directly to the receiving scheme and the administration and payment of my retirement benefits will be that provider's responsibility.



Please tick this box if you intend to take your retirement benefits with your new provider immediately.

Please note: if your new provider wants us to pay the tax free cash sum to you, you will need to contact us for an Open Market Option quotation.

DETAILS OF MY NEW PENSION PROVIDER

Please enter the name and address of accepting pension provider.

Name

RC Administration Ltd

Address

1A Park Lane, Poynton, Cheshire

Postcode SK12 1RD

NEW PROVIDER'S REFERENCE

Please enter here your plan number with your new provider, or a contact reference number to help us pay your transfer.

Policy number

N/A

Contact reference

Adobie Family SSAS

Continued ➡

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