

PRIVATE

25 October 2023

Retirement Capital
Retirement Capital Ventura Wales
Building Merthyr Tydfil Business Park
CF48 4DR

Our Ref: 0991680
Classification: **CONFIDENTIAL**

Dear Sir/Madam,

Member: Mr MIKE EDWARDS
Plan Number: SBR Solutions Executive Pension
Date of Birth: 22 March 1972

The above client is a member of the Investor SIPP. BW SIPP LLP act as Administrator for the Investor SIPP and Investor SIPP Trustees Limited is the Trustee.

The Investor SIPP is a registered pension scheme under Part 4 of the Finance Act 2004 and the Pension Scheme Tax Reference number is 00835804RJ. Please find enclosed evidence of registration.

The member wishes to transfer benefits under the above plan to the member's individual fund under the Investor SIPP. A copy of the member's request to transfer is enclosed.

I understand that the benefits are provided under a Defined Contribution arrangement. Can you please therefore arrange for the transfer value payment to be paid into the below Investor SIPP bank account.

Name of Bank: Natwest
Account Name: Transfer Account
Bank Account Number: 55095372
Sort Code: 60 60 05
Payment Reference: 0991680 EDWARDS

If you are unable to make the payment directly into our bank account, please contact us to discuss arranging the payment by cheque.

Please provide full details of the transferring plan including details of crystallised and uncrystallised amounts.

If the scheme is a **Defined Benefits scheme** or a **Dependants pension** please contact us before making any payments. Please note that **we are not an Annuity provider and cannot accept Open Market Option payments**. Please also note that **we do not accept transfers from non-UK-registered pension schemes**.

If you have any queries, please do not hesitate to contact us on 0333 566 0158.

Yours faithfully

SIPP Administration Team
BW SIPP LLP

important information

please review sections 1-3 to ensure your details are correct. **once printed, do not make any changes to these sections, as it could invalidate the form and slow down your transfer.**

please sign and date the declaration in section 4 and return the form to the address provided.

if any of your details are incorrect, please contact us on 0345 607 6001

1 about yourself

SIPP account number:

0 9 9 1 6 8 0

full name:

MR MIKE EDWARDS

permanent residential address:

18 LIME TREE WAY
PORTHCAWL
MID GLAMORGAN
18 LIME TREE WAY
CF36 5AU

date of birth:

22 March 1972

national insurance no.:

NX941735A

contact number:

01656715471

email address:

mikeje99@gmail.com

2 existing pension

who is your existing pension provider

Retirement Capital

name of pension scheme

CSAS

reference number of the pension

SBR Solutions Executive Pension

pension provider address

Retirement Capital Ventura Wales Building Merthyr Tydfil Business Park CF48 4DR

pension provider contact number

N/A

type of scheme being transferred in

SIPP

are investment services provided by a separate broker or online platform?

☐ yes

☒ no

defined or safeguarded benefits

☐ yes

☒ no

3 transfer information

we now need to understand the value of your existing pension and what parts you would like to transfer

do you wish to transfer

☒ all of your pension

☐ only part of your pension

is the pension in drawdown

☒ not in drawdown

☐ entirely in drawdown (fully crystallised)

☐ partially in drawdown (partially crystallised)

how much do you estimate the pension is currently worth?

£250000

how do you intend to transfer your pension

☒ cash

☐ investments

☐ cash and investments

how much cash will you be transferring?

£All

4 Declaration (please read and sign this section)

1. I authorise and instruct you to transfer assets from the plan(s) as listed in this form directly to the receiving scheme in the form of:-

a. cash payment made by cheque, or such other method agreed with Interactive Investor Services Limited; and/or

b. an in-specie transfer of assets held on my behalf (after deduction of any outstanding liabilities or charges). Where appropriate Interactive Investor Services Limited will advise details of the nominee/ parties to whom assets must be transferred. I understand that the existing investment manager or administrator of the transferring scheme is responsible for collecting dividends and tax reclaims, and realising all rights and entitlements in respect of the assets transferred and for passing them to the receiving scheme

2. I understand that until assets have been received in my new account I may not be able to sell existing investments or purchase new ones. This may mean that I am 'out of the market' for this period.

3. Where you have asked me to provide you with any original policy document(s) in return for the transfer of assets and I am unable to do so, I accept responsibility for any claims, losses and expenses of any nature which you may incur as a result of having made the transfer(s) listed in this form.

4. I authorise you to release all necessary information to Interactive Investor Services Limited or BW SIPP LLP or Investor SIPP Trustees Limited to enable the transfer of funds to the receiving scheme. I agree that a copy of this authority should have the validity of the original.

5. If an employer is paying contributions to any of the plans listed in this form, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan.

6. Until this application is accepted and complete, I accept that the receiving scheme administrator's responsibility is limited to the return of the value held by them, which may be lower than the transferred value due to changes in the value of assets then held to the current plan.

7. Where the payment made to the receiving scheme represents all of the funds under the plan listed in this form, then payment made as requested will discharge the current provider of all claims and responsibilities in respect of the plan listed.

8. Where the payment made to the receiving scheme represents part of the funds under the plan listed in this form, then the current provider will be discharged of all claims and responsibilities only in respect of the part of the plan represented by the payment.

9. I accept responsibility in respect of any claims, losses and expenses that Interactive Investor Services Limited or BW SIPP LLP or Investor SIPP Trustees Limited and the current provider may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

10. I apply to the scheme administrator of the receiving scheme to accept the transfer from the transferring scheme and to pay it into my SIPP. I confirm that the information provided relevant to my application to transfer benefits into my SIPP is, to the best of my knowledge and belief, correct and complete.

11. I confirm that I have not received from Interactive investor Services Limited, BW SIPP LLP or Investor SIPP Trustees Limited any advice or recommendation in respect of this transfer.

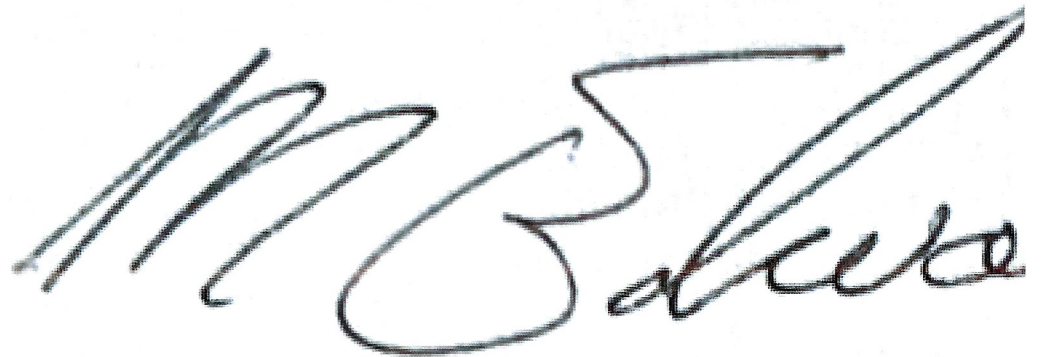
Additional declaration for transfers of Income Drawdown Benefits (if applicable)

12. I declare that all, or a part, of the transfer payment has been designated to provide income drawdown pension benefits for me under the transferring scheme.

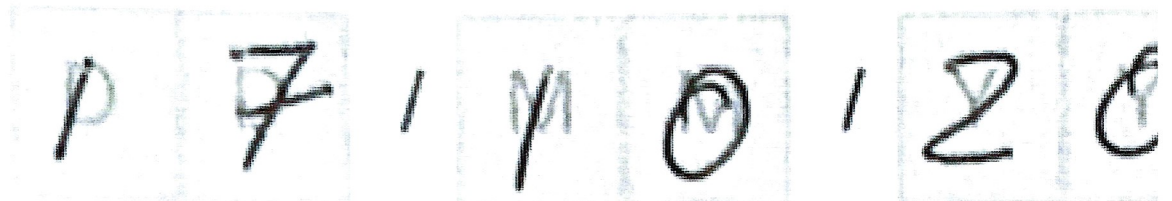
13. I understand that the transferring scheme is responsible for confirming the amount (if any) designated to provide these benefits.

14. I further understand that the amount of the transfer payment representing these benefits will be applied to provide me with income drawdown benefits under the receiving scheme and will be subject to the same maximum income limit (if any) as under the transferring scheme, until such time as a further review of this limit is triggered.

Signature

A handwritten signature in dark ink, appearing to read "M. B. Kuro", written within a rectangular box.

Date

A handwritten date "10/17/20" written within a rectangular box, with each digit and symbol contained in its own sub-box.

What to do next

Please sign and return this transfer to
Transfers Team, interactive investor,



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User Name: (00024146)
PSTR 00835804RJ

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Current scheme details

Pension Scheme Name	The Investor SIPP
Deferred annuity contract / Retirement No	
annuity contract made after 5 April	
2006	
Date scheme registered	25 May 2017
Name of Scheme Administrator who	BW SIPP LLP
submitted the application for	
registration	

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

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