

Retirement.Capital
Venture Wales Building
Merthyr Tydfil Industrial Business Park
Merthyr Tydfil
Wales
CF48 4DR

15 March 2023

Dear Sir / Madam

Policy / Reference Number: 000064000000K&SABOLS
Account Owner: Mr Kevin Abols

The above client wishes to transfer their benefits from your arrangement to the St. James's Place Personal Retirement Plan. This is a UK Registered Pension Scheme which was formerly approved as an Appropriate Personal Pension Scheme. The Pension Scheme Tax Reference number is 00616190RZ and its ASCN is A7001200H.

Please arrange for the payment to be sent to us by BACS to the following details:
Account Name: St James's Place UK Plc, Sort code: 20-13-42, Account No: 50642371

If payment by BACS is not appropriate please send a cheque payable to St. James's Place UK plc.

Any correspondence should be sent to:
St. James's Place UK plc
Administration Centre
PO Box 9034
Chelmsford
CM99 2XA

When sending the payment please quote ARND113637086.

If you need any further information please call us on 0800 027 1030 or email us at NBS@sjpadmin.co.uk quoting the above number.

Yours faithfully



Customer Service Executive- St. James's Place UK Plc



Client Declaration

For transfers into a St. James's Place Retirement Account

Please complete in block capitals and black ink

Client Full Name

Kevin Abols

Partner Name

Andrew Heyes

Partner Code

999305W

Are you an existing St. James's Place client?

☐ Yes

☒ No

If Yes, what is your account number?

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Retirement Capital

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Client Declaration

To the Existing Pension Scheme(s) Administrators

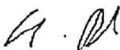
- I authorise and instruct you to transfer sums and assets from the Scheme(s) above directly to St. James's Place and to provide any instructions and/or discharge required by any relevant third party to do so.
- Where you have asked me to give you any original policy document(s) in return for the transfer of sums and assets and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the transfer(s) from the scheme(s) above.
- I authorise you and St James's Place to obtain from each other and release to each other any information that may be required to enable the transfer of sums and assets to St. James's Place.

- I authorise you to obtain from and release to my St. James's Place Partner any additional information that may be required to enable the transfer of sums and assets.
- I authorise you, St. James's Place and any employer paying contributions to any of the Scheme(s) above, to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to St. James's Place.
- Where the payment(s) made to St. James's Place represent(s) all of the sums and assets under the Scheme(s) above, then payment made as instructed will mean that I shall no longer be entitled to receive pension or other benefits from the Scheme(s) listed above.
- Where the payment(s) made to St. James's Place represent(s) part of the sums and assets under the Scheme(s) above then payment made as instructed will mean that I shall no longer be entitled to receive pension or other benefits from that part of the Scheme(s) represented by the payment.

To St. James's Place and Existing Pension Provider

1. I promise to accept responsibility in respect of any claims, losses and expenses that St. James's Place and the current provider(s) 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.
2. I consent to St. James's Place giving to or obtaining from the administrator or insurer of the transferring arrangement or others, such further information as may be reasonably necessary for the installation and administration of any Plan set up as a result of the transfer.
3. I agree that until this application is accepted and complete, the responsibility of St. James's Place is limited to the return of the total payment(s) to the current Scheme Administrator.

Signatures**Signature of Client**


Date 22 February 2023 Y

Please print your title and name
Kevin Abols

Daytime phone number (including area code)

Signature of Power of Attorney

Date D D M M Y Y Y Y

Please print your title and name

Daytime phone number (including area code)

Signature of Trustee in Bankruptcy

Date D D M M Y Y Y Y

Please print your title and name

Daytime phone number (including area code)

Signed for and on behalf of the Trustees

Date D D M M Y Y Y Y

Please print your title and name

Daytime phone number (including area code)

To be completed if the Client is under 18

1. I confirm I am the parent/legal guardian of the above-named Client.
2. I understand that I will be responsible for the Retirement Account until the Client reaches 18.
3. I understand that the transfer paid to the Retirement Account may only be returned to the Client in the form of benefits payable under the rules of the scheme.

Signature of Parent or Legal Guardian

Date D D M M Y Y Y Y

Please print your title and name

Daytime phone number (including area code)

BETA

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Your pension schemes

If you want to view a pension scheme that you did not register through this service, you must [use the Pension Schemes Online service](#).

Scheme name	SRN	PSTR	Status
St.James's Place Additional Retirement Plan		00639237RB	Open
St. James's Place Personal Retirement Plan		00616190RZ	Open
Return to ST JAMES'S PLACE UK PLC			

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BETA This is a new service – your [feedback](#) will help us to improve it.

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St. James's Place Personal Retirement Pl an's information

What is the name of the scheme? St. James's Place Personal Retirement Pl an

What type of scheme is St. James's Place Personal Retirement Pl an? Other

Which country was St. James's Place Personal Retirement Pl an established in? United Kingdom

[Return to St. James's Place Personal Retirement Pl an](#)

St. James's Place Personal Retirement Plan

Accounting for Tax returns

[Start a new AFT return](#)

[View or change past AFT returns](#)

Pension scheme details

Pension Scheme Tax Reference:
00616190RZ

Registration for Tax:
5 April 2006

[View or change the registered scheme details](#)

Payments and charges

Total of outstanding payments

£0.00

[View your financial overview](#)

[View all payments and charges](#)

Pension scheme administrators

Added on 5 April 2006:
ST JAMES'S PLACE UK PLC

[Invite a scheme administrator](#)

[View or remove a scheme administrator](#)