

PRIVATE

25 May 2023

Our Ref: 5674957
Classification: **CONFIDENTIAL**

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

Dear Sir/Madam,

Member: MR PAUL HAYWARD
Scheme: hayward site services executive pension scheme
Plan Number: 5567882
Date of Birth: 17 December 1963

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 in specie to the member's individual fund under the Investor SIPP. A copy of the member's request to transfer and a schedule of the assets to be transferred in specie are enclosed.

The re-registration of assets will be handled by our Investment Manager, Interactive Investor (iii), who will contact you directly to discuss the re-registration. Their contact details are as follows:

Transfers
Interactive Investor Services Limited
2nd floor
One Embankment
Neville Street
Leeds
LS1 4DW
Tel: 0345 607 6001
Email: sipptransfers@iii.co.uk

If there is a residual cash balance in the member's plan, please transfer this to the Investor SIPP bank account detailed below.

Name of Bank: Natwest
Account Name: Transfer Account
Bank Account Number: 55095372
Sort Code: 60 60 05
Payment Reference: 5674957 HAYWARD

BW SIPP LLP, 163 West George Street, Glasgow, G2 2JJ
0333 566 0158 www.barnett-waddingham.co.uk

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 the value of each asset at the date of re-registration and details of crystallised and uncrystallised amounts.

If the scheme is a **Defined Benefits pension** 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



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User Name: (A0009656)
PSTR 00835804RJ

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 - [View Application for Registration Details](#)
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 - [View Current Scheme Details](#)
 - [Amend Scheme Details](#)
 - [Scheme Administrator Management](#)
 - [Practitioner Management](#)
 - [View Submission Receipts](#)
 - Pension Service Notices for Scheme
 - [View Notices](#)
 - Reporting
 - [Event Report](#)
 - [Accounting for Tax](#)
 - [Pension Scheme Return](#)
 - Quick Links
 - [The Pensions Regulator](#)
 - [VAT](#)
 - [Your Online Services](#)
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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

Name of Scheme Administrator who BW SIPP LLP

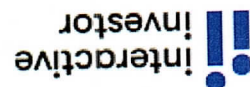
submitted the application for

registration		
Scheme status	Open	
Sub-scheme	No	
Pension scheme structure	Single	
The scheme is an investment regulated	Yes	
pension scheme		
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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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:

5 6 7 4 9 5 7

full name:

MRS PAUL HAYWARD

permanent residential address:

17 YORK GARDENS
WOLVERHAMPTON
WV3 9BY

date of birth:

17 December 1963

National Insurance no.:

NE265097C

contact number:

01902420408

email address:

P.HAZE@BLUEYONDER.CO.UK

2 existing pension

who is your existing pension provider

Retirement Capital

name of pension scheme

hayward site services executive pension scheme

reference number of the pension

5507882

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

SSAS

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

how much do you estimate the pension is currently worth?

£62353.61

how do you intend to transfer your pension

cash

investments

cash and investments

how much cash will you be transferring?

£ All

what do you estimate to be the overall value of the investments you are 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 the existing investment manager or administrator of the transferring scheme is responsible for collecting dividends and tax reclaim, 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 continuing 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



Date

12/05/2023

What to do next

Please sign and return this transfer form along with a discharge form from your current pension provider to the Transfers Team, Interactive Investor, 2nd floor, One Embankment, Nevile Street, Leeds, LS1 4DW

The i i SIPP, including the provision of the associated Brokerage Services, is operated by Interactive Investor Services Limited, incorporated in England and Wales with company number 2101863. Registered office: 201 Dockgate, Manchester, M3 3NW. Authorised and regulated by the Financial Conduct Authority (Financial Services Register firm reference number 141263). Member of the London Stock Exchange and NEX Exchange. The i i SIPP is authorised to provide SIPP services to investors in the UK. SIPP services are provided by Interactive Investor Services Limited, incorporated in England and Wales with company number 10670452. Registered office: 201 Dockgate, Manchester, M3 3NW.

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Current scheme details

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

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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