



Retirement Capital
VENTURE WALES BUILDING
MERTHYR TYDFIL INDDUSTRIAL PARK
PENTREBACH

CF48 4DR

New Business Team, Royal London House
Alderley Park, Congleton Road
Nether Alderley, Macclesfield, SK10 4EL
Direct Dial 0345 60 50 050
Direct Dial Fax 01625 60 54 00
E-Mail NB4@royallondon.com
Web Site royallondon.com/pensions

Please quote: J6855605

27 June 2024

Dear Sir

Planholder name:	Mr Alistair Gibson
Date of birth:	05/06/1963
Retirement Capital reference:	090076
National Insurance number:	NA873017B
Receiving Product Type:	Income Drawdown

The above planholder wishes to transfer the funds from their Retirement Capital plan to Royal London. Please find attached completed discharge forms allowing the funds to be released to the Royal London Personal Pension Plan.

Please accept this as confirmation that Royal London is willing to accept the transfer from you.

Payment can be made to Royal London using the following account details:

Payee:	Royal London
Sort code:	01 10 01
Account no:	63580586
Reference:	J6855605

or by cheque to the above address.

Mr Alistair Gibson



Please note that Royal London will only accept a transfer if the following conditions are met:

- the benefits have been equalised in terms of Article 141 of the Treaty of Rome (if benefits are coming from a company pension scheme or a statutory pension scheme),
- the transfer value is at least equal to the value of any guaranteed minimum pension (if benefits are coming from a company pension scheme that was previously contracted out of State Earnings Related Pension Scheme prior to 6 April 1997),
- the transfer is from a registered pension scheme.

Please can you also confirm:

- the Pension Scheme Tax Reference (PSTR) number, and
- whether the client has already triggered the Money Purchase Annual Allowance.

If the transfer is in respect of a plan that is already in drawdown (TID), please confirm the following information:

- Total transfer value
- Total Crystallised amount
- Total Uncrystallised amount
- Plan start date
- Next GAD limit review (where applicable)
- Existing GAD max amount (where applicable)
- Income received by planholder since last annual review

Please note that we cannot accept any TIDs where short-term annuities have already been set up.

If you have any queries please do not hesitate to contact us on 0345 603 0154 between 8am and 6pm, Monday to Friday.

Yours faithfully


PP¹ Claire Fraser
Service Delivery Manager



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User Name: (A0010969)
PSTR 00605400RD

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Current scheme details

Pension Scheme Name	Royal London Personal Pension Scheme (No2)
Deferred annuity contract / Retirement annuity contract made after 5 April 2006	No
Date scheme registered	05 Apr 2006
Name of Scheme Administrator who registered the scheme	Royal London Mutual Insurance

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

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User Name: (ACJ10000)
PSTR 000605400RD



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Current scheme details

Part of Scheme Name	Royal London Personal Pension Scheme (No2)
Deferred annuity contract / Retirement	No
Annually contract made after 5 April 2015	
Date scheme registered	05 Apr 2006
Name of Scheme Administrator who registered the scheme	Royal London Mutual Insurance

Scheme status

Sub-scheme	Over
Part of scheme details	No

The scheme is an investment regulated pension scheme

Band of number of scheme members 10001+

Registered for relief at source No

Occupational pension scheme No

Country or Territory scheme established: UNKNOWN

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