

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:

Date of birth:

Retirement Capital reference: National Insurance number:

Receiving Product Type:

Mr Alistair Gibson

05/06/1963 090076

NA873017B 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:

Sort code:

Account no: Reference: Royal London

01 10 01 63580586

J6855605

or by cheque to the above address.

The Royal London Mutual Insurance Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The firm the Financial Services Register, registration number 117672. Registered in England and Wales number 99064. Registered office: 80 Fenchurch Street, London, EC3M 4BY. In the Republic of Ireland: The Royal Lundon Mutual Insurance Society Limited is authorised by the Prudential Regulation Authority in the UK and is regulated by the Central Bank of Ireland for conduct of business rules.

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

- 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

Claire Fraser

Service Delivery Manager

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(iii) HM Revenue & Customs

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User Name: (A0010969) PSTR 00605400RD

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Current scheme details Pension Scheme Name Deferred annuity contract / Retirement annuity contract made after 5 April 2006

Date scheme registered

Name of Scheme Administrator who registered the scheme

Royal London Personal Pension Scheme (No2)

05 Apr 2006

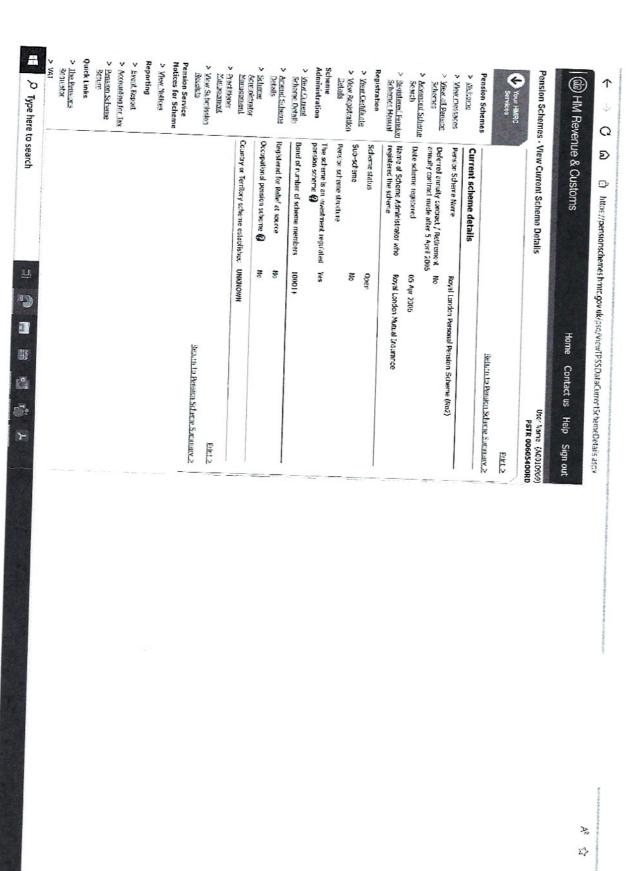
Royal London Mutual Insurance

25/06/2024, 14:10 HM R Scheme status	Revenue & Customs: Pension Schemes - View Current Scheme Details
Sub-scheme	Open 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 2	No
Country or Territory scheme established	UNKNOWN

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