

## Private and Confidential

Data Processing Centre,  
Retirement Capital,  
Venture Wales Building,  
Merthyr Tydfil Ind. Bus. Park,  
CF48 4DR

To whom it may concern

## Pension Transfer Request to L&G

Member: Ms Angela Parker  
Date of Birth: 10/01/1963 NINO: 10/01/1963  
Ceding Scheme: Retirement Capital - ags pension fund trust  
Ceding Reference: 00813624RP  
Occupational: yes

The member named above has applied for a transfer to their Legal & General pension plan. A copy of their application form is enclosed. This includes authority to provide information. Where available, completed warranty or discharge forms are also enclosed.

The member has advised us that this is a transfer from a Defined Contribution scheme.

If the ceding scheme is a Defined Benefit/Final Salary scheme where the member has an option to stay in the scheme as a deferred member, please advise us, and do not send any funds at this time.

Should the member have less than 2 years' service in a Defined Benefit/Final Salary scheme with no option to defer, we are able to accept the transfer as a short service refund. This request has been made by the member directly and as such no positive recommendation has been provided by an IFA.

We are also unable to accept the transfer if the plan has any of the following:

- Investments in a With-Profits fund
- Any guaranteed benefits such as Guaranteed Annuity Rates (GAR's), Guaranteed Minimum Pensions (GMP)
- Is subject to a divorce earmarking order/pension credit.
- Is in Income Drawdown, Flexi-Access Drawdown
- Contains crystallised funds.

We believe that the proposed transfer payment is from a UK registered pension scheme.

If any of the statements above are incorrect, please let us know and supply the relevant information but please do not send a transfer payment at this time.

Date: 26 July 2024

Our reference number:  
2377908601/ER

### Manage Your Account



Manage your pension pot  
online at

[legalandgeneral.com/mya](https://legalandgeneral.com/mya)

### Contact us



[indintogrouptv@landg.com](mailto:indintogrouptv@landg.com)



Member Support Helpline  
0345 070 8686

Open Monday to Friday  
9.00am to 5.00pm

We may record and monitor calls.  
Call charges will vary.



DC Pensions Transfers In  
Legal & General  
PO Box 1560  
PETERBOROUGH  
PE1 9AP



If all the statements above are correct, please send us payment for the transfer with the following information:

- Full name of your pension scheme
- HM Revenue & Customs pension scheme registration number; **we are unable to accept a transfer payment without this**
- Confirmation of whether the member has triggered their Money Purchase Annual Allowance (MPAA) and if so, the date of this.
- Confirmation of whether the member has a Protected Retirement Age
- Total transfer value, including the breakdown if any benefits include a Protected Retirement Age

For transfer payments made by BACS, please send to the following account:

Account Number: 50197165  
Sort Code: 20-19-90  
Account Name: Legal & General Assurance  
Bank: Barclays Bank, Broadgate, Leicester, Leicestershire, LE87 2BB

**When sending the payment please include the members Legal & General policy number or their National Insurance number as the reference and the PSTR number for your Pension scheme.**

Alternatively, cheques can be made payable to Legal & General Assurance Society Ltd.

If you have any questions, please contact us by phone or email, quoting our members' reference on all correspondence.

Yours sincerely

*e. rogers*

**Euan Rogers**  
Individual Pension Transfers  
Workplace DC Pensions







# Pension transfer request



Received On 19 Jul 2024

Dear pension holder,

You can either print and complete this form and return it to the address below, or scan and return it by email to [indintogroupptv@landg.com](mailto:indintogroupptv@landg.com). If you're contacting us by email please remember not to send any banking information because email is not a secure method of communication.

DC Pensions  
Legal & General  
PO Box 1560  
PETERBOROUGH  
PE1 9AS



After sending the form to us, we'll then contact your existing provider and begin the transfer process. Your current provider may also ask you to complete additional forms.

① Please complete all pages before returning the form.

## 1. Your personal details

What is your Legal & General policy number?

237 790 8601

What is your full name and title?

Mr/Mrs/Miss/Ms/Other

MRS

Surname

PARKER

First name(s)

ANGELA DENISE

What is your date of birth?

DD/MM/YY

10/01/63

What is your current permanent residential address including postcode and telephone number?

Address

BRENTWOOD

13 SPRINGFIELD DR

WISTASTON CREWE

Postcode

CW2 6RA

Home phone

Mobile phone

07722 559482

Email address

georgiesgirl4963@gmail.com

What is your National Insurance number?

(You must have a permanent National Insurance number)

NA 55 0771 B

## To my current provider and Legal & General

- I authorise, instruct and apply to the current provider to transfer sums and assets from the plan(s) as detailed below directly to Legal & General and to provide any instructions and/or discharge required by any relevant third party to do so.
- I accept that in order to comply with regulatory obligations, my current provider and Legal & General named in this application may need to verify my identity and residential address and may use credit reference agency searches and ask for my documents to verify my identity and address.
- I authorise you, Legal & General, any contributing employer and any named financial adviser in this application 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 Legal & General.
- Until this application is accepted, and complete, Legal & General's responsibility is limited to the return of the total transfer payment(s) to my current provider.
- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Legal & General and my current provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application.

## 4. Signatures

- ① Sign, date and return to us at the address on the front page.

### Applicant

I agree to the terms set out in the 'Declaration' and the use of my information as described in the privacy policy.



Signature

18/7/24

Date (DD/MM/YY):

### Contact us

**0345 070 8686**

Open Monday to Friday 9.00am to 5.00pm

Send us a secure message by logging into My Account: <https://myaccount.landg.com/>

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## 2. About the pension pot you'd like to transfer

Please give details of the pension pot you'd like to transfer. You can use this form to transfer the full value of a pension, for partial transfers call 0345 070 8686. We can only accept Defined Contribution pensions (also known as Money Purchase).

Who is the current pension provider?

What is the existing plan number?

What is the estimated pension value?

Pension provider email address

Pension provider address.

Address

Postcode

RETIREMENT CAPITAL  
JAGS PENSION FUND TRUST  
PSTR - 00813624 RP

£ 34045.09

esther@retirement.capital  
0330 311 0088

DATA PROCESSING CENTRE  
RETIREMENT CAPITAL  
VENTURE WALES BUILDING

MERTHYR TYDFIL IND. BUS. PARK

CF48 4DR

## 3. Declaration

① It is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

### To my current provider

- I have read any information provided or made available to me by Legal & General and the current provider in connection with this transfer and confirm that I wish to transfer my benefits in the current plan to the new plan.
- I understand that my transfer payment will be invested in the same investment fund or funds as my regular contributions. If I'm not currently paying contributions my transfer value will be invested in the same proportions as my existing investment strategy.
- I confirm that I am not in a defined benefits/final salary scheme, invested in With Profits, or taking Income Drawdown or Flexi-Access Drawdown and I authorise Legal & General to proceed with the transfer of my funds.
- I understand my transfer payment will be invested in line with the terms and conditions of the new plan.
- When payment is made to Legal & General as instructed, this means that you shall no longer be entitled to receive pension benefits from the whole of the plan listed here where the whole of the plan is transferring, or that part of the plan represented by the payment(s) if only part of the plan is transferring.
- I have read any information provided or made available to me by my current provider in connection with this transfer, and will read any further information provided.

