



Financial Services Limited
Local Matters, National Strength.

Date	7th February 2012	Our Ref	Louise Cottam
FAO Brad Pension Practitioner Daws House 33-35 Daws Lane London NW7 4SD		HW Financial Services Ltd 120-124 Towngate Leyland Preston PR25 2LQ FSA No. 134190	
Department:		Your Ref	
Client Name	David Smith		
Policy No	SCC807093		
DOB			
Enclosed:		Required	
<input type="checkbox"/>	Letter of authority	<input checked="" type="checkbox"/>	Acknowledgement
<input type="checkbox"/>	Anti Money Laundering Documents	<input type="checkbox"/>	Investment Schedule
<input type="checkbox"/>	Application Form	<input type="checkbox"/>	Policy Documents
<input type="checkbox"/>	DDM	<input type="checkbox"/>	Commission
<input type="checkbox"/>	Top Up Application	<input type="checkbox"/>	Confirmation of:
<input type="checkbox"/>	Investment Managers Agreement	<input type="checkbox"/>	Terms
<input type="checkbox"/>	Surrender Form to fully encash the bond	<input type="checkbox"/>	
<input type="checkbox"/>	Original Plan documents	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Partial surrender form	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
FURTHER REQUIREMENTS			
<p>Please find attached the SIPPCentres partial surrender form, I would be grateful if you would complete and forward directly to The SIPPCentre for processing.</p> <p>Please could you confirm when this has been actioned.</p> <p>Kind regards</p> <p>Louise Cottam</p>			

120-124 Towngate, Leyland, Preston PR25 2LQ

Telephone: 01772 458800 Fax: 01772 622935 Email: louise.cottam@hwfs.co.uk

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Registered Office : 6 Chesterfield Gardens, London, W1J 5BQ Registered in England & Wales, company no. 2030706

**SIPPDEAL E-SIPP
PARTIAL TRANSFER DISCHARGE FORM**

Arrangement: Sippcentre SIPP

Member: David Smith

Account Number: SCC807093

PART A – to be completed by the Member

I hereby request you to transfer a specified amount of £ 15,000.00 of the benefits to which I am entitled under the arrangement specified above, and pay that specified amount to the Scheme stated in Part B of this form.

I declare that I am legally entitled to the benefits in question, which the arrangement secures. I agree that payment by you in accordance with these instructions will fully discharge A J Bell Management Limited and Sippdeal Trustees Limited from liability to provide benefits for me from that specified amount under the above arrangement, and I indemnify you against all claims or proceedings made against you in respect of the benefits to be transferred, and against all resulting losses and expenses, which you may incur.

Signed by the member in his/her capacity as member to the arrangement:


.....

Dated 6/2/12

PART B – to be completed by the receiving Scheme:

I/We agree to accept the transfer payment and confirm the receiving scheme is a registered pension scheme under Finance Act 2004.

Full Name of Scheme

HMRC Pension
Scheme Tax
Reference

Scheme
Administrator's Name:

Address:

Is the scheme contracted out? ☐ Yes ☐ No

If Yes, please ensure the relevant section is completed on the next page

1
The first part of the report deals with the general situation of the country and the progress of the work. It is followed by a detailed account of the results of the various investigations carried out during the year. The report concludes with a summary of the work done and a list of the publications issued during the year.

The second part of the report deals with the results of the various investigations carried out during the year. It is followed by a detailed account of the results of the various investigations carried out during the year. The report concludes with a summary of the work done and a list of the publications issued during the year.

The third part of the report deals with the results of the various investigations carried out during the year. It is followed by a detailed account of the results of the various investigations carried out during the year. The report concludes with a summary of the work done and a list of the publications issued during the year.

The fourth part of the report deals with the results of the various investigations carried out during the year. It is followed by a detailed account of the results of the various investigations carried out during the year. The report concludes with a summary of the work done and a list of the publications issued during the year.

David Smith - SCC807093

The transfer payment will be paid directly to the Scheme Administrator's bank (please note that it is not possible to issue a cheque):

Bank Name:
Account Name:
Account Number:
Sort Code:
The reference to be quoted

If the client has requested an in-specie transfer, can you please complete the following: -

Stockbroker Details

Name of Stockbroker:
Address:
Telephone Number:

To be completed if transfer contains protected rights

Does the transfer satisfy the conditions contained in The Protected Rights (Transfer Payment) Regulations 1996, as amended by The Protected Rights (Transfer Payment) (Amendment) Regulations 2005?

☐ Yes ☐ No

Scheme's contracted-out number

ASCN
SCON
ECON

If the receiving scheme is an occupational scheme

Will the member be in contracted-out employment with scheme?

☐ Yes ☐ No

Date on which member joined the scheme
Revaluation rate, if applicable

Signed: Dated
(On behalf of the Receiving Scheme)

Position:

Company:



1. The first part of the document is a letter from the President of the United States to the Congress, dated January 1, 1861.

2. The second part is a report from the Secretary of the Treasury, dated January 1, 1861, on the state of the Treasury.

3. The third part is a report from the Secretary of the Navy, dated January 1, 1861, on the state of the Navy.

4. The fourth part is a report from the Secretary of the War, dated January 1, 1861, on the state of the War.

5. The fifth part is a report from the Secretary of the Interior, dated January 1, 1861, on the state of the Interior.

6. The sixth part is a report from the Secretary of the Agriculture, dated January 1, 1861, on the state of the Agriculture.

7. The seventh part is a report from the Secretary of the Education, dated January 1, 1861, on the state of the Education.

8. The eighth part is a report from the Secretary of the Commerce, dated January 1, 1861, on the state of the Commerce.

9. The ninth part is a report from the Secretary of the Finance, dated January 1, 1861, on the state of the Finance.

10. The tenth part is a report from the Secretary of the Public Works, dated January 1, 1861, on the state of the Public Works.