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Monday to Friday

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14 December 2023

Our reference: 3500188

Dear Sir/Madam

WE'VE RECEIVED A TRANSFER REQUEST

We've received a transfer request from Mr Derek Abram asking that we go ahead with a transfer to Abram Pension Plan SSAS. We're now considering this request.

Please can you provide us with an up to date screen shot of the HMRC approval. This should be in the form of a screen print from the HMRC Pension Schemes online and should show the current scheme status and registration details. The screen print should also show that this is dated within the last 30 days.

NEXT STEPS

We need to gather information to check if this transfer is an authorised payment and is permitted under Section 169 of the Finance Act 2004.

We'll also check whether your customer has a statutory right to transfer their pension under the Pension Schemes Act 1993. This protects our customers' interests. Until the transfer goes ahead, we'll only contact your customer about this transfer request.

IF YOU WANT TO CONTACT US

If you have any questions or need more information you can email us at the address given above, or call us. Please have your plan number to hand if you call.

Yours faithfully

Scottish Widows

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