

Our Ref: WS/K213
Member's name: Ms A Niewiadomska
Arrangement number: 2966111301

MEMBER DECLARATION

Once you have considered the points in our referral and would still like to proceed with the transfer, please complete the below declaration indicating you have understood this letter and are happy with the below points.

I agree and acknowledge that Legal & General:

- A. Does not know whether or not the receiving scheme is designed to provide access to my pension benefits earlier than is normally permitted.
- B. May carry out checks to establish whether the receiving scheme is registered with HMRC.
- C. May carry out checks to establish whether the transfer would be a recognised transfer for HMRC's purposes.
- D. May delay to make the transfer until it has satisfied itself that:
 - I. the receiving scheme is registered with HMRC, and
 - II. the transfer would be a recognised transfer for HMRC's purposes
- E. Will let me know if it requests additional information from the receiving scheme to satisfy itself of the facts described in D)(i) and (ii) above.
- F. Will calculate the transfer value based on policy terms and conditions when it has received all the additional information and has satisfied itself of the facts described in D)(i) and (ii) above, OR
- G. Will write to me if it has not satisfied itself of the facts described in D)(i) and (ii) above
- H. will have no liability in respect of my pension benefits after it has made the transfer.

I declare and confirm that:

- A. I have exercised my statutory right to require Legal & General to transfer my pension benefits to the receiving scheme.
- B. I understand that the receiving scheme is registered with HMRC.
- C. I have read and understood the regulatory leaflet, together with the regulatory information on www.legalandgeneral.com/protectyoursavings, that Legal & General has given me.
- D. I have read and understood the 'Things To Consider When Transferring A Pension' and how this may impact me.
- E. I understand that, if the receiving scheme is designed to provide access to my pension benefits earlier than is normally permitted (i.e. before age 55), there is a serious risk of significant tax charges. There may also be a risk that the receiving scheme charges significant fees.
- F. I will not hold Legal & General responsible in any way and I will not seek any compensation, or seek any payment of any kind from Legal & General, and will not ask Legal & General to take any action in relation to any tax charges, any significant fees or any other losses of any kind which arise because of the transfer.
- G. I hereby discharge Legal & General Assurance Society Limited from any and all liability under this Scheme.
- H. This declaration is true and correct

Money and Pensions Advice Service reference number

893586/081123

Signed

Niewiadomska A.

Date

20 / 12 / 2023