



## Guardian Pension Consultants

Providing Pension Trustee & Administration  
Services for Self-Administered Pensions

t. 01254 660333  
f. 01254 268531  
e. [info@guardianpc.co.uk](mailto:info@guardianpc.co.uk)  
w. [www.guardianpc.co.uk](http://www.guardianpc.co.uk)

Guardian House, Capricorn Park,  
Blakewater Road, Blackburn,  
Lancashire BB1 5QR

### Strictly Private & Confidential

Brad Davis  
Pension Practitioner.Com  
Daws House  
33-35 Daws Lane  
London  
NW7 4SD

23<sup>rd</sup> September 2013

Our Ref: Morr/008/JM

Dear Brad,

### The Guardian SIPP Re Annette Morris

With reference to the above named client, I am pleased to enclose the Transfer Information Statement.

We can confirm that a sum of £107,538.10 was paid to you via CHAPS on 23<sup>rd</sup> September 2013 to the account details stated on the transfer form. The Royal Bank of Scotland bank account and the Guardian SIPP have now been closed.

Please note that the transfer payment represents a full discharge of the liability of Guardian Pension Trustees Limited.

We can also confirm that according to our records there is no pension sharing or earmarking order currently in place.

Should you have any queries or require anything further, please do not hesitate to contact me on the details provided below.

Yours faithfully

Jenna Mackintosh  
SIPP Administrator  
[Jenna@guardianpc.co.uk](mailto:Jenna@guardianpc.co.uk)

Let's create a SIPP solution!





# Guardian Pension Consultants

Providing Pension Trustee & Administration  
Services for Self-Administered Pensions

## TRANSFER INFORMATION STATEMENT

<b>Name</b>	Annette Morris
<b>Date of Birth</b>	14/07/1961
<b>National Insurance Number</b>	WL983000B
<b>Address</b>	54 Lowther Hill Forest Hill London SE23 1PT

<b>Name of Transferring Scheme</b>	The Guardian SIPP Re: Annette Morris
<b>PSTR Number</b>	00644946RT
<b>Scheme Reference</b>	Morr/008
This payment comes from a Registered Pension Scheme approved under Chapter 2 of Part 4 of the Finance Act 2004.	
<b>Administration Office Address</b>	Guardian House Capricorn Park Blakewater Road Blackburn Lancashire BB1 5QR

<b>Date of Transfer</b>	23/09/2013	
<b>Total Transfer Value</b>	£107,538.10 (full transfer)	
<b>Split as Follows:</b>	Cash	£107,538.10
	In-Specie Investments	£
	In-Specie Property	£

### DRAWDOWN INFORMATION

<b>Crystallised Fund</b>	n/a
<b>Date of Crystallisation</b>	
<b>Percentage of Standard Lifetime Allowance Used</b>	
<b>Pension Commencement Lump Sum Paid</b>	
<b>Current Maximum GAD Annual Income</b>	
<b>Gross Income Paid in Pension Year</b>	

This transfer represents a full discharge of the liability of Guardian Pension Trustees Limited in respect of the above plan.