

**TPI Pension Transfer Schedule**

**Client Name:** William Alexander Holdsworth

**Date of Birth:** 22/09/1956

**Our Account Number:** P0755-33498-00314

**Receiving Policy Number:** 45835336R

We confirm that this transfer is from a registered pension scheme approved by the H M Revenue and Customs Pension Schemes Office as a Personal Pension Scheme for the purposes of Part 4 of Finance Act 2004 under Pension Scheme Tax Reference 00804947RC

The Scheme Administrator is:

**True Potential Investments LLP**  
**Newburn House**  
**Gateway West**  
**Newburn Riverside**  
**Newcastle upon Tyne**  
**NE15 8NX**

**Crystallised Funds**

**Crystallised Fund Value:** £ 144,648.91

**Date of Crystallisation:** 19/08/2022

**Tranche Type:** Flexi Access

**LTA Used:** 18.63

**Income Taken in Current Tax Year:** N/A

We confirm that the client does not have any form of Lifetime Allowance or Lump Sum Protection

We confirm that the scheme is not subject to Pension Credit Rights

We confirm that there is not any Dependents Benefit Entitlements

We confirm that there is not any Pension Sharing / Ear Marking / Other Court Orders

We confirm that an amount of £ 144,648.91 was transferred on 25/09/2023. This amount represents the client's full benefit entitlement under the TPI Pension and as such all duties and responsibilities of True Potential Investment LLP are now fully discharged.

Kind regards,

Transfer out team

**True Potential Investments LLP**  
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