

St. James's Place
Request to Transfer

To St. James's Place

I, Miss Claire Hamlett-Ledger, request you to pay the sum shown in the schedule below representing the whole sum due on the Account mentioned therein by a crossed cheque payable as indicated below. I understand any tax free cash protection from pre 6 April 2006 rights will be lost on transfer, unless this is part of a block transfer, or Primary / Enhanced Protection applies.

Account Number

RA24186587

Total Sum Payable

£31,601.07

Receiving Scheme :

Payee*/**

*For insured or partially insured schemes, the payment must be payable to the Insurer

**For non – insured schemes, payment must be made payable to the
Trustees of the *Company Name* Retirement Benefits Scheme

Address of Payee

.....

.....

.....

DECLARATION – TO BE COMPLETED IN ALL CASES

Please pay the full proceeds of the above Plan/s in accordance with the instructions above.

Settlement in terms of the instruction given will be full discharge of St. James's Place's liability for the benefits as described in this form.

Signed  Date 23/01/2024
(Miss Claire Hamlett-Ledger)

The value indicated is based on unit prices on the last regular contribution was paid. The actual value will be based on prices on the date following receipt of all the required documentation (claim form including lifetime allowance declaration, Transfer Value Information Form and HMRC acceptance letter) fully completed at the St. James's Place Administration Centre.