

Plan Summary

1 Investor details

| | |
|---------------|---|
| Name | Mr Anthony Arther James Smith |
| Address | Manor Barns Manor Lane Whilton Northampton NN11 5UH |
| Gender | Male |
| Date of birth | 20/10/1961 |

2 Transferring scheme details

| | | | |
|-----------------------|---|---------------------------------|---|
| Full name of scheme | The PY SIPP | | |
| Type of scheme | Registered pension scheme under chapter 2, part 2 of the Finance Act 2004 | | |
| Plan number | P301682 | | |
| HMRC reference number | 00605328RH | | |
| Scheme drawdown type | <input checked="" type="checkbox"/> Flexi-access | <input type="checkbox"/> Capped | <input type="checkbox"/> Not applicable |

3 Transfer breakdown value

| | |
|---|------------|
| Cash transferred | £48,306.24 |
| Value of investments transferred | - |
| Cash held at investment manager transferred | - |
| Value of property transferred | - |
| Closing mortgage value | - |
| Date of last property valuation | - |
| Total uncrystallised transfer value | - |
| Total crystallised transfer value | £48,306.24 |
| Total transfer value | £48,306.24 |

4 Details of crystallised funds transferred


Flexi-access drawdown arrangements

| Plan number | Current Transfer value | Date benefits started | Total original net drawdown | Total PCLS taken | Income taken in current Tax Year | Total SLA (%) used by the funds transferred | MPAA date triggered |
|-------------|------------------------|-----------------------|-----------------------------|------------------|----------------------------------|---|---------------------|
| 1001 | £48,306.24 | 15/01/2019 | £49,318.78 | £16,439.59 | £0.00 | 6.38% | N/A |

5 Declaration

- We declare that to the best of our knowledge the information above is true and complete and that the transfer value represents the whole of the applicant's accrued rights to benefits under the transferring scheme/arrangement
- We confirm that the fund is not subject to a bankruptcy, pension sharing or earmarking order.

Signed by administrator



Date 06/02/2022