

FAO: Ms G Stuliglowa
Pension Practitioner
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

12 February 2019

Dear Ms. Stuliglowa

RE: Country Fresh Foods SSAS

Please find enclosed the final Transfer form for Sandra to transfer her pension into the SSAS.

Please can you complete the forms and return them to us as soon as possible.

Should you have any queries please don't hesitate to contact me.

Yours sincerely



Rhianna Noble
Administrator



Sun Life Financial of Canada

Section 7 – receiving scheme details and declaration

Please ask your receiving scheme to fill in this section.

Name of receiving scheme	Country Fresh Foods SSAS
Address of receiving scheme	C/o TAG Wealth Management Riverdale, 89 Graham Road, Sheffield S10 3GP
Pension scheme tax reference	00834979RB
ASCON	N/A
ECON	N/A
SCON	N/A

Please tell us who we should
make the cheque payable to

No cheque facility, please make the payment by
BACS as per the account details provided.

Declaration

We confirm that:

- We are able and willing to accept the funds.
- If this is a payment under the Open Market Option, we will either start the client's annuity within six months of the date that the funds are paid, or tell Sun Life Financial of Canada, in good time, so they can report the lump sum payment to the member as unauthorised.

Signature

Print name

Sandra Dowker

Position

Scheme Trustee and Administrator

Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>



**Sun Life Financial
of Canada**

Application To Transfer Your Pension Benefits

*This plan is a registered
Pension Scheme under the
Finance Act 2004.*

Please fill in all the relevant sections using BLOCK CAPITALS.

Section 1 - your personal details

Plan number(s)	EL2206148B									
Title	MRS									
First name(s) (In full)	SANDRA									
Surname	DOWKER									
Date of birth	Day	Month		Year						
	21	10		1951						
National Insurance number	W	M	4	5	8	8	8	9	B	
Does your pension have a pension sharing or 'earmarking' order?										
Yes <input type="checkbox"/> No <input type="checkbox"/>										
Telephone number(s)	07801 465350									
Email address	SANDRA.DOWKER@HOTMAIL.CO.UK									

LP00000332/0122

Sun Life Assurance Company of Canada (UK) Limited, incorporated in England and Wales, registered number 959082, registered Office at Matrix House, Basing View, Basingstoke, Hampshire, RG21 4DZ, trades under the name of Sun Life Financial of Canada and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.



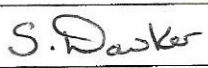

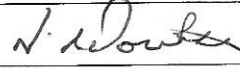
Sun Life Financial of Canada

Section 6 – your declaration

I confirm that I understand the following:

- Once my savings are transferred, I and my dependants will not get anything from this plan.
- The amount I get will be based on the net value of the plan(s) after Sun Life Financial of Canada gets all the information it needs.
- My transfer value may be less than the plan value, especially if I transfer my plan early and it includes an early cancellation charge.
- The value of the fund is not guaranteed as investments can fall as well as rise. This means that the transfer value and tax-free cash may vary.
- I want to stop saving into the plan right away. If I pay anything in while my money is being transferred, I understand that the transfer might be delayed while the payment is refunded.
- Sun Life Financial of Canada has not given me financial advice about which options to choose.

I declare that to the best of my knowledge and belief that the information in this application is correct and complete.

Your signature							
Please print your name	SANDRA DOWKER						
Trustee signature							
Please print your name	SANDRA DOWKER						
Trustee signature							
Please print your name	NEIL DOWKER						
Date	<table border="1"><thead><tr><th>Day</th><th>Month</th><th>Year</th></tr></thead><tbody><tr><td>09</td><td>02</td><td>2019</td></tr></tbody></table>	Day	Month	Year	09	02	2019
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Sun Life Financial of Canada

Section 4 - your transfer choice

1. What type of transfer do you want to make? (please only tick one box)

Use the Open Market Option to buy a guaranteed income for life
(an annuity) with another pension provider

☐

Please go to question 2

Transfer all your savings into a different pension plan with another company.

☒

Please go to section 6

2. Do you want to take a tax-free lump sum from your pension savings?

Yes ☐

No ☒

If 'yes' please go to question 3

If 'no' please go to section 6

If you decide to go ahead with the Open Market Option, we will pay your tax-free lump sum before transferring the rest of your pension savings to your receiving scheme.

If you choose to take a tax-free lump sum we will send a cheque to you for this amount.

We cannot pay you any more than the maximum amount.

3. How much tax-free lump sum do you want to take?

Maximum amount available

☐

Specified amount (less than the maximum)

Please go to section 5

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Yes ☐

No ☐

If 'yes' please go to question 3

If 'no' please go to section 6

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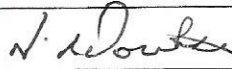
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Rhianna Noble
Administrator

Head Office: Riverdale, 89 Graham Road, Sheffield S10 3GP Tel: 0114 263 0888

Email: info@tag.uk.com Web: www.tagwealth.org.uk

TAG Wealth Management is an appointed representative of Intrinsic Financial Planning Ltd and Intrinsic Mortgage Planning Ltd, which are authorised and regulated by the Financial Conduct Authority

Partners: D.Thompson MLIBF DipFA, A.R.M.Young DipFA