

Personal pension plan details

Plan number	TK91023093	Plan name	Pension 98
		Start date	26 January 1999
Plan holder	Richard Kenneth Edwards	Plan status	Active
Retirement age	60	Trust	No
Beneficiaries	Ms Mandy Ingram 100%	Life cover	None
		Waiver of payment	None - it's no longer possible to add this.
		PST reference no.	00605426RG
Plan regulations	This contract is a registered pension scheme under Part 4 of the Finance Act 2004		

Fund values

These amounts aren't guaranteed and may go up or down in the future

Fund value	£413,153.05
Plus final bonus	£39,727.04
Transfer value	£452,880.09

We've based these figures on the values as at **15 May 2022**.

Final bonus - we'll pay you a final bonus if one applies when your plan reaches maturity or if you take money out of the With-Profit Fund early.

The fund value includes loyalty units. If you stay invested with us we may award more loyalty units in the future.

Plan activity

Switches in the last 2 plan years	None
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Plan holder: Richard Kenneth Edwards

Plan number: TK91023093

Is a partial transfer allowed

You can usually transfer part of the pension. If you're thinking about doing this, please get in touch with us.

Get 24/7 access to your pension at MyAviva

You can look at your plan online 24/7. You can keep track of your pension and most other policies you have with us, in one secure and convenient place, at myaviva.co.uk.

You can check your life insurance policy, find car insurance documents and even view pension statements from previous years. Registering for MyAviva is quick, and it's completely free. It's just one of the ways we're making life easier for you.

What if I don't want to keep making payments?

You can still keep the pension money you've built up in your pension with us for as long as you need to, or you can transfer it to another provider if you'd rather.

Your pension money has to stay in a pension until you're at least 55, unless you retire early because of ill health.

Your pension money will stay invested in your chosen funds unless you tell us to move it. Please remember that your pension's value can go down as well as up, and the effect of inflation and any charges will reduce how much your pension money is worth over time.

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Don't forget...

We have a range of options you may wish to look into if this plan is no longer suitable for your needs.

However if you're thinking of transferring your plan, you should get some regulated professional financial advice before making a decision.

A financial adviser can help you look at your pension, your personal circumstances and the options you have, to make a recommendation about what's best for you. If you'd like more information, please speak to your financial adviser.

If you don't have one, you can visit unbiased.co.uk for a list of advisers where you live.

I've enclosed discharge forms if you want to transfer this plan.

- *The fund value includes loyalty units. If you stay invested with us we may award more loyalty units in future.*
- *We have lots more information about our pension products online – go to aviva.co.uk for more information*
- *We offer a range of retirement solutions; visit Retirement at aviva.co.uk*

Transfer form

Please fill in this form using black ink and in BLOCK CAPITALS and send it back to us at this address:
Aviva, PO Box 520, Norwich, NR1 3WG.

For us to continue working through your transfer, we need you to fill in this form **completely**.

Aviva scheme details

Plan number

TK91023093

Plan holder name

Richard Edwards

Details of new pension provider

New pension provider

Department

Address

Contact name, if known

New plan number,
if known

I understand that:

- the values given to me, and any illustration of benefits I have received, are not guaranteed and may go up or down in the future. The amount Aviva transfers may differ from the amounts quoted.
- where the payment represents all of the benefits under the plan, then Aviva is discharged from its obligation to make any further payments under that plan.
- where the payment represents only part of the benefits under the plan, Aviva is discharged from its obligation to make any further payments in respect of that part of the plan represented by the payment.
- any payment does not discharge Aviva for any act/error in dealing with the plan.
- if the benefits are moved to another provider, Aviva cannot accept them back into this plan.

What this means to you:

- 1) The value we transfer may be different to the amount shown in any quote we may have given you.

Transfer form

- 2) When all the money in your pension plan is transferred to your new provider we won't be responsible for paying you any more money from that plan.
- 3) When part of the money in your pension plan is transferred to your new provider we'll only be responsible for the money that's been left in your Aviva plan. We won't be responsible for the amount we've transferred to your new provider.
- 4) Even if we transfer some or all of the money in your plan to a new provider, we'll still be responsible if we later find we've made a mistake with your plan.

Please only sign here if you have read all the information on this form and are sure you want to transfer your pension benefits to another provider. Doing so will mean you will lose any features or guarantees you may have with us.

Please pay the transfer value of the plan named on this form.

Plan holder's signature

Date

Transfer form – new pension provider

Please make sure this form is filled in by **your new pension provider** using black ink and in BLOCK CAPITALS and send it back to us at this address: Aviva, PO Box 520, Norwich, NR1 3WG.

Aviva scheme details

Plan number

TK91023093

Plan holder name

Richard Edwards

New pension provider details

Scheme / contract name

Scheme / contract number

Bank details for new provider

Bank

Account holder name

Account number

Sort code

BACS payment reference

Type of scheme – please tick one box only

☐

A registered personal pension
(including stakeholder) scheme

☐

Small self-administered schemes
(SSAS)

☐

Self-invested personal pension
(SIPP)

☐

Occupational defined contribution

☐

Occupational defined benefit

For any of these schemes please fill in section 1 **and** section 3

☐

Overseas scheme
Please contact us for an overseas
transfer quote on **0800 068 6800**

☐

Any other type of scheme
Please fill in section 2 **and** section 3

Transfer form – new pension provider

Section 1

New pension provider HMRC registration /
approval reference number

Date approved

Name and address of new provider

Please enclose a copy of your HMRC registration / approval letter

Section 2

Type of scheme

Receiving scheme approved by tax authority

Tax authority reference number

Please enclose a copy of your HMRC registration / approval letter

Section 3 – Declaration of new pension provider

Please sign the declaration below:

I confirm the above statements are true. When we receive and accept the transfer request we'll use it to provide benefits for, or in relation to, the member of the scheme. This is in accordance with the appropriate regulations made under the Finance Act 2004.

Signed

Position

Signing for and on behalf of
the trustees / administrators of

Date