

Scheme name: WPL_ LEGAL & GENERAL WORKSAVE PENSION PLAN
 Member's name: Ms K Daly
 Account number: 2421737401

MEMBER DECLARATION.

Please do not separate the attached declarations, please send these forms back together, once all have been completed.

THE LAST CONTRIBUTION

If you are an active member of the pension scheme it is possible that we may receive a final contribution after we have transferred your pension pot.

If you think there may be a final contribution due, you should contact your employer to inform them that you are transferring your pension pot and unless you are setting up a new one, then no more contributions should be deducted from your salary.

If we do receive a final contribution after you've transferred and you are not setting up a new pension pot with us we will try to pay it to your new pension provider. If they do not accept we will pay it to you as a cash lump sum and tax charges will apply. In some cases the tax charges may be as high as 70%.

MAKING FURTHER CONTRIBUTIONS INTO A LEGAL & GENERAL PENSION POT

If you or your employer intend to continue making contributions to a Legal & General pension pot after you've transferred, you'll need to speak to your employer, as a new pension pot will need to be set up to accept any future contributions.

MEMBER DECLARATION FOR TRANSFERRING YOUR PENSION POT TO ANOTHER PROVIDER

I DECLARE AND CONFIRM THAT:

- A) I have exercised my statutory right to require Legal & General to transfer my pension benefits to the receiving scheme.
- B) I understand that the receiving scheme is registered with HMRC.
- C) I have read and understood the regulatory leaflet, together with the regulatory information on www.legalandgeneral.com/protectyoursavings, that Legal & General has given me.
- D) I have read and understood the 'Things To Consider When Transferring A Pension' and how this may impact me.
- E) I understand that, if the receiving scheme is designed to provide access to my pension benefits earlier than is normally permitted (i.e. before age 55), there is a serious risk of significant tax charges. There may also be a risk that the receiving scheme charges significant fees.
- F) I will not hold Legal & General responsible in any way and I will not seek any compensation, or seek any payment of any kind from Legal & General, and will not ask Legal & General to take any action in relation to any tax charges, any significant fees or any other losses of any kind which arise because of the transfer.
- G) I hereby discharge Legal & General Assurance Society Limited from any and all liability under this Scheme.
- H) This declaration is true and correct.

8 MEMBER DECLARATION.

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I AGREE AND ACKNOWLEDGE THAT LEGAL & GENERAL:

- A) does not know whether or not the receiving scheme is designed to provide access to my pension benefits earlier than is normally permitted.
- B) may carry out checks to establish whether the receiving scheme is registered with HMRC.
- C) may carry out checks to establish whether the transfer would be a recognised transfer for HMRC's purposes.
- D) may delay to make the transfer until it has satisfied itself that:
 - i. the receiving scheme is registered with HMRC, and
 - ii. the transfer would be a recognised transfer for HMRC's purposes
- E) will let me know if it requests additional information from the receiving scheme to satisfy itself of the facts described in D)(i) and (ii) above.
- F) will calculate the transfer value based on policy terms and conditions when it has received all the additional information and has satisfied itself of the facts described in D)(i) and (ii) above, OR
- G) will write to me if it has not satisfied itself of the facts described in D)(i) and (ii) above
- H) will have no liability in respect of my pension benefits after it has made the transfer.

Please delete as appropriate.

I can confirm that I have / have not received financial advice in relation to this transfer.

RECEIVING SCHEME

Name of receiving scheme: RC Administration Limited (FNK SSAS)

Receiving scheme HMRC registration number: 20006301RA

Signed: _____ Date: 11 / 12 / 2023

Please provide a contact telephone number so that we may contact you to resolve any queries as quickly and efficiently as possible.

07719913295

If you would like to receive regular updates by text messaging to your mobile phone, on the progress of your transfer, please tick this box: ☒

Mobile
number:

07719913295

Please be advised that SMS text messages are not a completely secure method of communication and there is a low risk that someone else could intercept messages.