

## Plan Summary

### 1 Investor details

Name	Mr Philip Goldman
Address	Flat 1 Litfield Place Clifton Down Bristol BS8 3DL
Gender	Male
Date of birth	07/11/1956

### 2 Transferring scheme details

Full name of scheme	The Curtis Banks SIPP		
Type of scheme	Registered pension scheme under chapter 2, part 2 of the Finance Act 2004		
Plan number	CB1855		
HMRC reference number	00740779RV		
Scheme drawdown type	<input type="checkbox"/> Flexi-access	<input type="checkbox"/> Capped	<input checked="" type="checkbox"/> Not applicable

### 3 Transfer breakdown value


Cash transferred	£553,705.89
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	£553,705.89
Total crystallised transfer value	-
Total transfer value	£553,705.89

## 4 Declaration

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- 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 19/04/2021