

# Information for the receiving pension scheme

## Existing arrangement details

Planholder name	Mr GREG THOMPSON
Plan number(s)	593055
Date of birth	24 June 1975
Scheme name	GPP for Reg Vardy
Contact address	LANCING BN15 8GB
Plan type	Prudential (2000) Personal Pension Scheme
Benefit Type	Uncrystallised

The pension scheme is registered in accordance with section 153 of the Finance Act 2004, or deemed registered in accordance with paragraph 1 of Schedule 36 to the Finance Act 2004.

PSTR number	00605321RJ
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## Transfer value as at 15 September 2021

Total transfer value	£4,685.67
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The above figures are not guaranteed and will be recalculated before the payment is made.

## Additional transfer details

Are any rights resulting from a pension share included?	No
Are any of the rights being transferred subject to a pension earmarking or attachment order?	No
Are drawdown pension funds included?	No
Has any tax free lump sum been paid in connection with the rights being transferred?	No
Since April 2015, to Prudential's knowledge, have benefits been taken using HM Revenue & Customs flexible access rules triggering the money purchase annual allowance?	No
Will the transfer be part of a block transfer?	No
Can any of the rights being transferred be taken before minimum retirement age?	No
Does any Lifetime Allowance protection apply to the benefits being transferred?	No

Phone: 0345 075 2244

Or (+44) 178 644 8844 if phoning from abroad.

Lines open Monday to Friday, 8.30am-6pm

# Transfer value

Plan number

593055

Scheme name

GPP for Reg Vardy

Planholder

GREG THOMPSON

Plan number(s)	593055
Planholder	Mr GREG THOMPSON
Total transfer value on 15 September 2021	£4,685.67

## This transfer value isn't guaranteed

This value isn't guaranteed and could go down as well as up.

## How we've calculated your transfer value

Plan number	593055	AMC adjustment	Transfer Value
		-£2.49	£4,685.67

An Annual Management Charge (AMC) adjustment applies to this plan, as shown above and is taken by monthly deductions. The amount shown above is the monthly AMC deduction in respect of the period between the last monthly charge date and due up until the quotation date of 15 September 2021.

# Transfer document checklist

Please ensure all forms have been fully and accurately completed, and all of the documents listed below are sent to us or the new provider / receiving scheme as indicated.

To be completed by the planholder, member or trustee		✓
'Transfer discharge' form	This form gives us the authority to transfer your pension to your new provider. It must <b>always</b> include the name and address of the pension provider receiving the transfer payment.  This must be fully completed and signed by the <b>planholder</b> .	

To be sent to / completed by the new provider / receiving pension scheme		✓
Transferring scheme information	Please send this to <b>the new provider</b> . They use this information when they're setting up the receiving scheme to receive the transfer value.	
New scheme HMRC registration letter	Please request this from <b>the new provider</b> . The new pension scheme manager should be able to provide a copy.	
Receiving scheme's transfer statement	Please send this to <b>the new provider</b> . It should be completed and signed by an authorised representative of the <b>receiving pension scheme</b> . The new provider can send it back to us directly.	

We will only be able to process this transfer once we have received the correctly completed documents.

Please return completed forms and documents to:

Prudential  
LANCING  
BN15 8GB

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# Transfer discharge form

To be completed by the planholder.

Plan number(s)	593055
Planholder	Mr GREG THOMPSON
Scheme name	GPP for Reg Vardy

**Please remember:** The amount paid will be recalculated when we pay the transfer and this may be higher or lower than the transfer value quoted previously.

**Please remember:** We will cancel the units and calculate the transfer value using the unit prices at the date of receipt of all the items requested, fully completed, together with any supporting documents. The amount transferred may be higher or lower than the figures shown previously.

Any incomplete or missing information will delay both the cancellation of units and the transfer payment to the receiving scheme.

I authorise you to transfer the above plan to:

(Please provide the full name and address of the pension provider or pension scheme set to receive the transfer payment.)

Name of new scheme/pension provider	
Address	
Postcode	
Reference number	
New contact name	
New contact telephone number	
New contact e-mail address	

### Partial transfer

If you'd like to request a partial transfer please provide details in the box below.

Please clearly write the total amount you wish to transfer out from your fund.

The minimum amount which can be transferred is £10,000.00

After any partial transfer, at least £30,000.00 must be left in your fund.



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## Transfer discharge form continued

Unless you tell us otherwise, we'll take an equal amount from each fund you have with Prudential. However, if you want to specify the fund(s) and/or the amount(s), please write the fund name(s) and the amount(s) to be transferred in the table below. If you wish to transfer the entire fund, please tick the All box.

Fund name	Amount (£)	All (please tick)
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If you'd like to discuss which fund(s) you want the transfer to be taken from, please call us.

Note: Lifestyle option – unless you tell us that you want to opt out of lifestyleing, your remaining fund value will automatically rebalance to the appropriate proportions for the stage you're at in your approach to retirement. For further details please visit [pru.co.uk/lifestyleing](http://pru.co.uk/lifestyleing).

Please add any special instructions regarding this transfer in the box below:

Special instructions	
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### How we use your personal information

For a copy of our latest Data Protection Notice, please visit [pru.co.uk/mydata](http://pru.co.uk/mydata). This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, LANCING, BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

In relation to the plan listed above, I agree to, and request, the transfer of benefits as indicated above.

### Planholder's declaration

Please read this declaration carefully before signing it. If you believe one or more of the statements below is/are not true in relation to the proposed transfer, and as a result you cannot sign the declaration, we may not be able to/cannot proceed with the transfer.

In relation to the plan listed above, I hereby declare:

- I agree to, and request, the transfer of benefits as indicated above.
- I understand the transfer value is not guaranteed. It will be recalculated before the payment is made, and may be higher or lower than the amount shown previously.
- I am the legal owner of the plan and am legally entitled to instruct you to transfer the value. I have never been adjudged to be bankrupt, there are no court orders and/or insolvent events affecting my plan.
- I understand and agree that payment of the transfer value will be in full and final discharge of your liabilities in respect of the benefits under the plan number stated above.
- I understand that if I have any entitlement under the Prudential plan(s) to a protected tax free lump sum, this may be lost upon transfer unless part of a block transfer or you've also registered for primary or enhanced protection. A protected pension age may also be lost upon transfer.

My date of birth is 24 June 1975.

# Transfer discharge form continued

- I declare that my date of birth shown and that the statements that I have made are correct and complete. I understand that making a false declaration may result in tax charges and other penalties.
- I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan(s).
- I also promise that I will be responsible for any losses and/or expenses which are the result of any untrue, misleading, or inaccurate information deliberately given by me, or on my behalf, either in this form or with respect to the benefits from the plan(s).

If you are concerned or have queries about one of the statements, please don't hesitate to contact us.

If you've previously been adjudged bankrupt; subject to a Debt Relief Order, Individual Voluntary Arrangement, Administration Order or another insolvent event; or your plans are/have been potentially affected by any other court orders, so that we can make the appropriate enquiries to decide whether or not the transfer can proceed, please contact us and provide us with relevant details/documentation, such as:

- a copy of the order concerned
- court/insolvency service reference number
- details of the court or insolvency service office, official receiver's office, insolvency practitioner and/or solicitors.

If you believe all other relevant parties concerned have consented to the transfer, please provide documentation to confirm. Please note we can't provide you with legal, financial or tax advice, and you should obtain such advice independently if you feel it's required.

Planholder's signature	
Name	GREG THOMPSON
Date	

Please provide a telephone number below which we can use to contact you between the hours of 8.30am and 6pm, Monday to Friday.

Preferred daytime contact number	07971 845816
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Before signing, if you're unsure of any of the terms we've used, please call us using the contact details in our covering letter.

Please note, if the new agreement is cancelled with the scheme indicated above, we may not be able to accept the transferred money back in to your original contract.

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Mr GREG THOMPSON  
376 ECCLESALL ROAD SOUTH  
SHEFFIELD  
S11 9PY

Date of this letter  
15 September 2021  
Plan number  
593055  
Scheme name  
GPP for Reg Vardy  
Planholder  
GREG THOMPSON

## Transferring your pension

Dear Mr THOMPSON



- The transfer value of your pension is £4,685.67 on 15 September 2021. This value isn't guaranteed and could go down as well as up.

Thanks for letting us know that you would like to transfer your pension.

- We've given you the transfer value and information to help you make sure that a transfer is right for you.
- If you decide to transfer, there are some forms you need to complete and the new provider will also ask you for information. We've enclosed all forms and included instructions in the 'Transfer document checklist'.
- Once we have everything we need, we'll send the transfer payment directly to the new provider, and we'll let you know when this has happened.

### Helping you make the right decision

Choosing to transfer your pension is a big decision. Once you've transferred, you might not be able to change your mind. To fully understand your options and make the right choice:

1. Read this letter and other enclosed documents carefully.
2. Consider obtaining free and impartial guidance about transferring your pension from Money Advice Service at [www.moneyadviceservice.org.uk](http://www.moneyadviceservice.org.uk) and Pensions Advisory Service at [pensionsadvisoryservice.org.uk](http://pensionsadvisoryservice.org.uk).
3. You should consider seeking financial advice for major financial decisions. If you already have a financial adviser, we recommend you speak to them. If you don't have a financial adviser, you can search for an independent financial adviser in your area by visiting [unbiased.co.uk](http://unbiased.co.uk).

# Receiving scheme's transfer statement



## Section 1 – Details of transferring scheme/ planholder

Scheme name	GPP for Reg Vardy
Planholder name	Mr GREG THOMPSON
Planholder date of birth	24 June 1975
Planholder NI number	JC761213B
Plan number(s)	593055

## Section 2 – Details of receiving scheme

This document should only be used for a transfer to a UK registered pension scheme.

Full name of receiving scheme/ provider	
Your plan number	
HMRC reference (PSTR or SF number)	
Scheme administrator's name	
Scheme administrator's address	
Postcode	
Name of contact (in case of enquiry)	
Telephone number	
Email address	

Type of scheme – the scheme is a: (please tick the relevant box.)

A) A pension scheme registered under Chapter 2, Part 4 of the Finance Act 2004.

B) A statutory pension scheme (as defined in Chapter 1, Part 4 of the Finance Act 2004).

If you have ticked option A please enclose a copy of the scheme's HMRC registration document.



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## Transfer statement continued

### Additional details

Is the scheme:

- (i) a non-insured self-administered scheme or a self-invested pension plan? Yes  No
- (ii) an insured scheme? Yes  No
- (iii) a public service pension scheme as defined in s150(3) FA2004? Yes  No
- (iv) a buy-out (deferred annuity) contract? Yes  No

If the scheme is an insured scheme, or a buy-out contract, we will usually make payment only to the life office insuring the scheme or contract.

### Section 3 - Payment details

Please note that if your scheme is fully insured then we will pay the transfer payment directly to the new insurance company, in accordance with HMRC requirements. If the transfer is to a non-insured scheme we will pay directly to the receiving provider or administrator.

Our preferred method of payment is BACS.

(a) If you would prefer payment by BACS please provide us with details of the account into which you would like payment to be made.

Sort code	
Account number	
Account name	
Name of bank	
Reference number	

(b) If you would prefer payment by cheque, to whom should the transfer cheque be made payable?

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This is the scheme/contract's: administrator  trustees  insurer

(c) Where should the cheque be sent (complete if different from above)?

Name	
Address	
Postcode	

# Transfer statement continued

## Section 4 – Receiving scheme declaration

This section is to be completed by an authorised signatory of the receiving scheme

We hereby declare

- we are willing to accept the transfer payment
- the transfer payment will be used to provide relevant benefits under a UK registered pension scheme, in line with Part 4 of the Finance Act 2004
- the information given in this questionnaire is complete and correct; and
- we consent to you referring this proposed transfer to HMRC and for HMRC to provide information to you relating to the registration of the receiving scheme.

Signed for and on behalf of the receiving scheme:

(Please note: if the new agreement is cancelled with the scheme indicated above, we may not be able to accept the transferred money back in to the original contract.)

Authorised signatory	
Name of signatory	
Contact phone number	
Position/title of signatory	
Date signed	



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