



St. James's Place
Request to Transfer

To St. James's Place

I, Mr Greg Ellis Thompson hereby request you to pay the sum shown in the schedule below representing the whole sum due on the Account mentioned therein by a crossed cheque payable as indicated below. I understand any tax free cash protection from pre 6 April 2006 rights will be lost on transfer, unless this is part of a block transfer, or Primary / Enhanced Protection applies.

Account Number

Total Sum Payable

RA06909022

£182,237.82

Greg Thompson Pension Scheme

Receiving Scheme :

Payee*/** Greg Thompson Pension Scheme

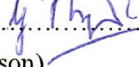
*For insured or partially insured schemes, the payment must be payable to the Insurer

**For non – insured schemes, payment must be made payable to the
Trustees of the *Company Name* Retirement Benefits Scheme

Address of Payee 1A Park Lane
..... Poynton
..... Cheshire
..... SK12 1RD
.....
.....

DECLARATION – TO BE COMPLETED IN ALL CASES

Please pay the full proceeds of the above Account in accordance with the instructions above.
Settlement in terms of the instruction given will be full discharge of St. James's Place's liability for the benefits as described in this form.

Signed  Date 15/10/21
(Mr Greg Ellis Thompson)

The value indicated is based on unit prices on 17 September 2021 and assumes the last regular contribution was paid on 26 April 2021. The actual value will be based on prices on the date following receipt of all the required documentation (claim form and Transfer Value Information Form) fully completed at the St. James's Place Administration Centre.



**Receiving Scheme/Policy Declaration
(TRANSFER VALUE INFORMATION FORM)**

Please tick one	<input checked="" type="checkbox"/>	
Pension transfer	<input checked="" type="checkbox"/>	To be completed by the receiving scheme trustees or administrator

Open market option	<input type="checkbox"/>	To be completed by the annuity provider
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Name of transferring scheme/arrangement:	Retirement Account
Policy/Reference Number:	RA06909022
Member's Name:	Greg Ellis Thompson
National Insurance Number:	JC761213B
Member's date of birth:	24-06-1975
The transferring scheme is a UK Registered Pension Scheme	

Name of receiving scheme and provider:	Greg Thompson Pension Scheme, RC Administration Ltd
Reference (to be used on correspondence and payments):	G Thompson
HMRC reference number:	20004516RJ
Date of scheme registration:	13-09-2021

If the Scheme has been registered within the last 24 months a copy of your HMRC approval letter must be provided

Payment details

Account Name:	Greg Thompson Pension Scheme
Account Number:	04919088
Sort Code:	23-83-96
Address:	Allied Irish Bank (GB) Four Hardman Street, Spinningfields, Manchester, M3 3PL
Reference to be included with payment (e.g. client name/policy number):	G Thompson SJP

PENSION TRANSFER (please do not complete for open market option)

1. We undertake that the receiving scheme is:

Please tick one ☒

A. Registered Defined Benefit Occupational Pension Scheme	<input type="checkbox"/>
B. Registered Defined Contribution Occupational Pension Scheme	<input checked="" type="checkbox"/>
C. Individual Personal Pension Scheme	<input type="checkbox"/>
D. (i) Qualifying Recognised Overseas Pension Scheme (QROPS)	<input type="checkbox"/>
D. (ii) Country under the law of which the scheme is established and regulated:	



OPEN MARKET OPTION	
We confirm that the member's fund will be used to secure a non-assignable, non-commutable annuity.	
1. We are/are not* able to accept business from a non UK scheme.	
Please note that no pension commencement lump sum will be provided on receipt of the member's fund.	
Address for correspondence:	
DECLARATION	
<input checked="" type="checkbox"/>	Please tick and complete appropriate section
<input type="checkbox"/>	Receiving Scheme Declaration (for pension transfer)
<input type="checkbox"/>	a) We declare that the information given above and overleaf is true and correct. <input checked="" type="checkbox"/>
<input type="checkbox"/>	b) We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with HMRC conditions of approval. <input checked="" type="checkbox"/>
<input type="checkbox"/>	c) We confirm that the transfer payment will be applied to an arrangement which satisfies the requirements of Sections 169(1D) and (1E) of Finance Act 2004 and SI2006/499 (as amended) <input checked="" type="checkbox"/>
<input type="checkbox"/>	d) If a non UK scheme, we: <ul style="list-style-type: none"> - are registered as a QROPS have not been excluded from being a QROPS. - give our authority for HMRC to give information to you about our QROPS status, and; - confirm that the legislation of the country in which our scheme is established allows us to accept a transfer from a UK Approved pension scheme. <input type="checkbox"/>
<input type="checkbox"/>	Annuity Provider's Declaration (for open market option)
<input type="checkbox"/>	Where the fund originates from a trustee based pension scheme, the grantee of the policy will be the trustees of the purchasing scheme unless otherwise instructed.
Signature:	please sign here
Company name:	RC Administartion Ltd
Position:	Administrator
Date:	19/11/2021