

# Handelsbanken

## STATEMENT OF ACCOUNT

LUTON BRANCH

STATEMENT NO: 78

Ground Floor, 252 Capability Green

PAGE: 1

Luton, LU1 3LU

CURRENCY: GBP

Tel: 01582 726694 or

DATE PRODUCED: 28OCT20

Handelsbanken Customer Support 0800 470 8000

PREVIOUS STATEMENT DATE: 28SEP20



INSTANT PENSION TRUST RE P & S JONES  
PRIVATE & CONFIDENTIAL PAUL JONES  
33 PLANTATION VIEW  
SILSOE GRANGE, SILSOE  
BEDFORDSHIRE MK45 4GG

A/C NO: 19445429  
INSTANT PENSION TRUST RE P & S JONES  
IBAN A/C NO: GB92HAND40516219445429  
BIC ADDRESS: HANDGB22  
(For Use In Cross Border Payments)

The interest rates applicable to your account as at this statement date are as follows:

Interest rate(s) charged on debit balances  
11.00%

Interest rate(s) paid on credit balances  
0.00%

VALUE DATE	DETAILS	PAYMENT (DEBITS)	RECEIPTS (CREDITS)	BALANCE
28SEP20	BALANCE BROUGHT FORWARD			5,099.84
29SEP20	B/O WEST-TEN LTD		1,625.00	
	SARAH OKAFOR 2 TEN			
	NOREF			6,724.84
02OCT20	PAUL JONES <i>DRAW DOWN</i>	3,000.00		
	P JONES			3,724.84
05OCT20	B/O NOT SUPPLIED BY ORIG		9,753.89	
	AEGON 80756459			13,478.73
08OCT20	B/O L SEATON		118.60 <i>1.15</i>	
	BUILDING INSURANCE			13,597.33
09OCT20	B/O COFUNDS NOMINEE LTD		246.11	
	/RFB/AEGON 80756459			13,843.44
13OCT20	B/O WEST-TEN LTD		118.60 <i>1.15</i>	
	SARAH OKAFOR 2 TEN			13,962.04
	NOREF			
21OCT20	LUTON BOROUGH COUNCIL	1,533.69		
	132779642			12,428.35
26OCT20	D.DR COFUNDS NOMINEES L	10.00		
	REF 1040348THE INSTANT			12,418.35

Please refer any enquiries concerning your account to your Account Manager JEREMY COOK  
at Handelsbanken within 30 days of the statement date

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name:** Instant Pension Trust

**Member Name:** Mr Paul David Jones

**Date of Birth:** 12<sup>th</sup> June 1965

**NI Number:** YY042534B

Please accept this as my written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Event:

**Required Benefits**

1. I wish to vest sufficient funds to provide a Tax Free Cash amount of £10,000
2. ~~I wish to vest sufficient funds to provide an annual Income amount of £~~

**Valuation of your share of fund at the time of crystallization: £716,465.09**

Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme)?

~~Yes~~

No

If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

Date: 19/02/2010

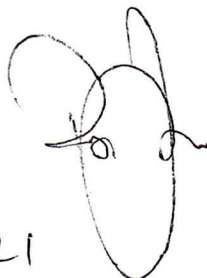
What is the percentage of the SLA used up under those earlier Benefit Crystallisation Events that occurred under any other Registered Pension Scheme you are (or were) a member of, as recorded on your latest scheme statement(s). Copy statement(s) **MUST** be attached.

**Name of Registered Pension Scheme: Instant Pension Trust**  
**% SLA – 6.85%**

Member Signed:

Date:

2/1/21



## Lifetime Allowance Certificate

**Scheme Name:** Instant Pension Trust

**Member Name:** Mr Paul David Jones

Does any of the following protections apply? No

Enhanced Protection

Primary Protection

Fixed Protection 2012

Fixed Protection 2014

Individual Protection 2014

Fixed Protection 2016

Individual Protection 2016

Rate of lifetime allowance at the time of BCE:

£1,073,100

Percentage of lifetime allowance remaining before this BCE:

93.15%

Percentage of lifetime allowance under this BCE:

3.727%

Percentage of lifetime allowance after this BCE:

89.423%

Date of BCE:

/ 12 / 2020

Amount of BCE used:

Before this event: 32.01%

After this event: 40.22%

Signed:

**For Scheme Administrator / Practitioner** \_\_\_\_\_

Member Signed: \_\_\_\_\_

Date:

2 / 1 / 21