



AMPS  
ASSOCIATION OF  
MEMBER-CONTROLLED  
PENSION SCHEMES

Xafinity  
PO Box 205  
Huddersfield  
HD8 1ET

15<sup>th</sup> December 2017

Dear Sirs

**Scheme Name:** Istrat Ltd SSA Pension Scheme  
**Your Reference:** 7065812  
**Member Name:** Paul Francis Hague

The above named member wishes to transfer their pension held with you into the above named pension scheme that we administer.

Please find enclosed the completed Transfer Out Authority Form and a copy of the schemes HMRC Registration Certificate. The PSTR number is 00566788RP.

The transfer value should be paid to the scheme bank account details provided below. I can confirm that we are happy to accept the transfer.

AIB (GB)  
Account Number 04690077  
Sort Code 23-83-96  
Account Name Istrat Ltd SSAS Pension Scheme

If you have any additional requirements please notify me as soon as possible in order to prevent any delays on the transfer, alternatively I look forward to receiving confirmation that the transfer has completed.

Yours sincerely

**Emma Dane**  
Senior Pensions Administrator



t: 0844 410 0037 e: [admin@cranfords.biz](mailto:admin@cranfords.biz) w: [www.cranfords.biz](http://www.cranfords.biz)

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# CAPGEMINI UK PENSION PLAN

## TRANSFER OUT AUTHORITY FORM - PART 1 (Authority to Transfer)

### MEMBER DETAILS

Member Name: Mr P F Hague  
Member Number: 7065812  
National Insurance Number (please confirm):  
Date of Birth (please confirm):

### MEMBER DECLARATION

To be completed by the member if the Trustees are requested to pay the transfer value available to a *Registered Pension Scheme*.

A separate authority is required for each transfer if it is split between different *Registered Pension Schemes*.

**To: The Trustees of Capgemini UK Pension Plan**

"I,

(Title) MR (Forename1) PAUL (Forename2) FRANCIS (Surname) HAGUE

This information will be used for the purposes of verifying your identity as described in the letter.

Request that the transfer value of £174,479.00 be paid to the following *Registered Pension Scheme*:

☒ ISTRAT LTD SSAS PENSION SCHEME  
(\*Receiving Arrangement Name)

I acknowledge that, on transfer of benefits to the above arrangement, both myself and my dependants will have no further claim on the Capgemini UK Pension Plan. I also acknowledge that I have read and understand the information provided with regards to pension scams."

Signed: [Signature] Date: 4/12/2017

### EMPLOYMENT DETAILS:

If transferring to an Occupational Pension Scheme, please provide confirmation of the following:

Name of Employer: N/A  
Date Employment Commenced: \_\_\_\_\_  
Location of Employment: \_\_\_\_\_

## CAPGEMINI UK PENSION PLAN

TRANSFER OUT AUTHORITY FORM - PART 2  
(Receiving Arrangement Information)

## MEMBER DETAILS

Member Name: Mr P F Hague  
Member Number: 7065812

## RECEIVING ARRANGEMENT INFORMATION

To be completed on behalf of the Administrator of the Receiving Arrangement. Please provide the following Scheme information:

Name of Registered Pension Scheme: ISTRAT LIMITED SSAS PENSION SCHEME  
Type of Arrangement: SSAS  
Policy/Ref No. of transferring member: PLEASE USE SCHEME NAME  
Registered name & number of Sponsoring Employer: HAANDLE LTD - 09247593  
HMRC Tax Reference Number (PSTR): 00566788RP  
Pension Scheme Ref No. (PSR) 009/106700

- The Receiving Arrangement is willing and able to accept the transfer including, where appropriate, the Contracting out GMP/Section 92b Rights (which may be converted to a non Contracted-Out benefit) and any EPB liability without completion of any equalisation indemnity **Yes/No** (Please select)
- A copy of the HMRC and Pensions Regulator's Registration is attached: **Yes/No** (Please select)
- A copy of the Receiving Arrangement Contracting Out Certificate (if the Scheme was contracted out of the State Second Pension) is enclosed: **Yes/No** (Please select) **N/A**.

\* If converted to PR.

If yes, please provide the information below:

Registered name & number of Sponsoring Employer: \_\_\_\_\_

Scheme Contracted-out Number (if applicable) - SCON \_\_\_\_\_

Employer Contracted-out Number (if applicable) - ECON \_\_\_\_\_

If the Receiving Arrangement is insured, please provide name of insurance company (payment cannot be made payable to a third party) otherwise name of Trustees Scheme account to whom payment will be made:-

Account Name: ISTRAT LIMITED SSAS PENSION SCHEME  
Sort Code: 23-83-96  
Account Number: 04690077  
Payment Reference: MR P F HAGUE

Signed: [Signature]  
(on behalf of the Administrator of the Receiving Arrangement)

Date: 15<sup>TH</sup> DECEMBER 2017



## CAPGEMINI UK PENSION PLAN

## TRANSFER OUT DECLARATION (Financial Advice)

## MEMBER DETAILS

Member Name: Mr P F Hague  
 Member Number: 7065812  
 Transfer Value: £174,479.00  
 Transfer Value Calculation Date: 28/11/2017

## MEMBER DECLARATION

Name of receiving Scheme: \* ISTRAT LIMITED SSAS PENSION SCHEME

I confirm that I have taken advice in relation to a transfer to the scheme above from a Financial Conduct Authority (FCA) approved independent financial advisor or an appointed representative:

Name of Advisor: PAUL ROBERTSON

Signed (Member):  Date: 4/12/2017

## FINANCIAL ADVISER OR APPOINTED REPRESENTATIVE DECLARATION

I confirm that :-

- I have given financial advice to Mr P F Hague in relation to a transfer of benefits from the Capgemini UK Pension Plan to the following *Money Purchase* arrangement

\* ISTRAT LIMITED SSAS PENSION SCHEME (Name of receiving Scheme)

- The advice that has been provided is specific to the type of transaction proposed by the above named member
- I have permission under Part 4A of the Financial Services and Markets Act 2000, or resulting from any other provision of that Act, to carry on the regulated activity in article 53E of the Financial Services and Markets Act 2000 (Regulated Activities) Order 2001

Name of Adviser: PAUL ROBERTSON

Address of Adviser: RIVERDALE, 89 GRAMM ROAD  
 SHEFFIELD  
 S10 3GP

Signed (IFA or appointed representative):  Date: 5/12/2017

(Financial Services Register) Firm Reference Number: 601628

Official Stamp: TAG WEALTH MGMT  
 RIVERDALE  
 SHEFFIELD S10 3GP

## CAPGEMINI UK PENSION PLAN

### TRANSFER OUT DECLARATION (Contracted-out Rights)

#### MEMBER DETAILS

Member Name:	Mr P F Hague
Member Number:	7065812

The Capgemini UK Pension Plan is contracted-out of the *State Second Pension* (previously the *State Earnings Related Pension Scheme*) and as such undertakes to provide a minimum level of benefits in a prescribed format, including increases to the pension in payment and the provision of a spouse's pension in the event of death.

If you transfer your benefits to a *Personal Pension Plan*, or to another employer's scheme which is not a *Salary-Related Contracted-out Scheme*, the receiving scheme is not necessarily going to provide benefits in the same format. The transfer can still go ahead, but we are legally required to obtain confirmation from you that you understand that the benefits you will eventually receive may be in a different form and a different amount than the benefits being given up.

Accordingly, please complete the following declaration and return with the rest of the required documents if you wish the transfer to go ahead.

#### MEMBER DECLARATION

I declare that:

1. I have received a statement from the receiving scheme showing the benefits to be awarded in respect of the transfer payment.
2. I accept that the benefits to be provided by the receiving scheme may be in a different form and of a different amount to those which would have been payable by the transferring scheme.
3. I accept that there is no statutory requirement on the receiving scheme to provide for survivor's benefits out of the transfer payment.

Signed (Member):



Date:

4/12/2017





Inland  
Revenue

Audit & Pension Schemes Services  
Yorke House  
PO Box 62  
Castle Meadow Road  
Nottingham NG2 1BG  
Telephone: 0115 974 0000  
Fax: 0115 974 1480

Your ref: SSAS/SM/H5644  
Our ref: 009/106700/00009078

Date: 16 January 2002

Deputy Director, Jayne Bannister

STANDARD LIFE ASSURANCE CO  
PO BOX 182  
BRUNSWICK HOUSE  
EDINBURGH EH7 5YP

Dear Sir/Madam

ISTRAT LTD  
88 A PENSION SCHEME (PH)

21 JAN 2002

I am authorised by the Board of Inland Revenue to state that the scheme named above has been approved as a retirement benefits scheme for the purposes of Chapter 1 Part XIV Income and Corporation Taxes Act 1988 with effect from 6 December 2001 and will be treated as an "exempt approved scheme" for the purposes of section 592 of that Act.

The approval is given on the understanding that this office will at once be advised of any alteration to the rules or other terms of the scheme and will be conditional upon compliance with the undertaking given by the Administrator, with sections 605 and 606 Income and Corporation Taxes Act 1988, and any regulations made by the Board under section 612(3) of the said Act.

Yours faithfully

A. A. B. pso approval

Controller

If telephoning please ask for P. BOWMAR  
on (0115) 9741522 (Direct Dial)