



AMPS
ASSOCIATION OF
MEMBER-DIRECTED
PENSION SCHEMES

Park View Administration
Oak House
317 Golden Hill Lane
Leyland
Lancashire
PR25 2YJ

25 September 2018

Dear Sir/ Madam,

Scheme: The Genwick Retirement Benefits Scheme
Member: Jacqueline Jones, Penny's Cottage, Tollard Green, SP5 5PX

We are writing to you about the above member who wishes to request a partial transfer of her assets which are held in the above.

We understand that she has spoken with you and requested a transfer of the Dolphin Investment, for which you have supplied her with some transfer papers. These have been completed by us as the receiving scheme and we can confirm that we are able to receive an in-species transfer as requested by the member.

In addition to the completed transfer forms, we have also enclosed a copy of the original scheme registration certificate and a copy of the current scheme details from the HMRC Online Portal.

I trust this to be in order, however should you require any further information or have any questions, please do not hesitate to call 0844 410 0037 where a member of the SSAS team will be happy to help.

Yours sincerely,



Paul Bennett
Senior Pension Administrator



t: 0844 410 0037 **e:** admin@cranfords.biz **w:** www.cranfords.biz

'Cranfords' is the trading style of 3110950 Ltd.(No. 3110950.) Cranfords is registered in England at 48 Chorley New Road, Bolton, BL1 4AP.

15/01/16 - 4 FEB 2016



Notification of registration

275010:00000001:001

ROWANMOOR GROUP PLC
46-50 CASTLE STREET
SALISBURY
SP1 3TS

HM Revenue & Customs
Pension Schemes Services
FitzRoy House
Castle Meadow Road
NOTTINGHAM
NG2 1BD

Notification of registration for tax relief and exemptions

We have registered JD Crouch Executive Pension Scheme on 27 01 2016. Tax relief and exemptions are due from this date.

This notification tells you that HM Revenue and Customs (HMRC) acknowledge your declaration of liability and registration of the above pension scheme for tax purposes only. It has no legal significance beyond advising you of that.

Your Pension Scheme Tax Reference (PSTR) is 00828818RA. You should use this when you want to view the scheme details online and in all future communications with us.

Your pension scheme

On your application for registration you have indicated that the scheme is an occupational and investment-regulated pension scheme. If the scheme ceases to be investment-regulated and/or changes its pension scheme structure, then you must tell us about the change on an event report. If there are any other changes, to any factor regarding a declaration or confirmation you gave when applying to register the scheme, please tell us as soon as possible.

An occupational pension scheme is defined in Section 150(5) of the Finance Act 2004 as 'a pension scheme established by an employer or employers and having or capable of having effect so as to provide benefits to or in respect of any or all of the employees of:

- that employer or those employers
- any other employer

whether or not it also has or is capable of having effect so as to provide benefits to or in respect of other persons'.

As you have indicated that this is an occupational pension scheme, we expect a genuine employer to have established the scheme. If this is not the case, we may deregister the scheme.

Your responsibilities as the scheme administrator

As part of the registration process you declared that as the scheme administrator you are a fit and proper person to carry out the role and you will comply with Section 270(3) of the Finance Act 2004. This means that you:

- understand that you will be responsible for carrying out the functions conferred or imposed on the scheme administrator by and under this section
- intend to carry out those functions at all times, whether resident in the UK or another state which is a European Union member state or a non-member European Economic Area state

If you do not comply with Section 270(3), or it appears to HMRC that you are not a fit and proper person, we may deregister the pension scheme.

Current scheme details

Pension Scheme Name	JD Crouch Executive Pension Scheme
Deferred annuity contract / Retirement annuity contract made after 5 April 2006	No
Date scheme registered	27 Jan 2016
Name of Scheme Administrator who submitted the application for registration	3110950 t/a Cranfords
Scheme status	Open
Sub-scheme	No
Pension scheme structure	Single
The scheme is an investment regulated pension scheme ?	Yes
Band of number of scheme members	1
Registered for Relief at source	No
Occupational pension scheme ?	Yes
Country or Territory scheme established	United Kingdom

Transfer Agreement / Discharge Forms

Name of the transferring scheme	THE GENWICK RBS
Name of the member	JACQUELINE JONES
Reference number	
Date of birth	12/12/1965
Guaranteed transfer value	
Guarantee end date	

Transfer of all of the transfer value to:

Name of the receiving scheme: JD CROUCH EXECUTIVE PENSION SCHEME

PSTR Reference No: 00828818RA

Type of scheme: ~~Occupational / SIPP / Overseas Pension / Personal Pension~~ / Other (please state)
SSAS

**delete as appropriate*

To be filled in by the administrator of the receiving scheme

Is the receiving scheme currently contracted out?

Yes ☐

No ☒

If yes, please complete the box below.

Employer's contracted-out number	
Scheme's contracted-out number	
Date contracted-out employment began	
How any Guaranteed Minimum Pension will be revalued	

We will transfer the payment directly to the receiving scheme's bank account. Please fill in the section below.

Bank Account:

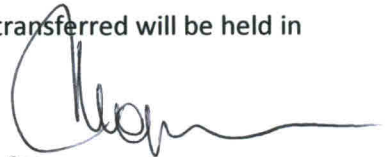
Name of Bank:	ALLIED IRISH BANK
Name on the Account:	JD CROUCH EXECUTIVE PENSION SCHEME
Bank Address:	VANTAGE POINT 4 HARDMAN STREET MANCHESTER
Postcode:	M3 3HF
Account No:	04919088
Sort Code:	23-83-96

Guarantee

We confirm to the Trustee of the transferring scheme that:

- The receiving occupational pension scheme is registered under Chapter 2 of 4 of the Finance Act 2004
- The member is a member of the receiving scheme and the sums transferred will be held in connection with that member.

Signature for and on behalf of the administrator of the receiving scheme:



Print name: MERLE OPER

Title: ADMINISTRATOR

Date: 25/09/2017

To be filled in by the member

Please pay all of my cash equivalent under the transferring scheme as a transfer value to the pension plan named on the first page.

- I confirm that I have been accepted as a member of the receiving scheme.
- I confirm that the administrator of the receiving scheme has agreed to accept the transfer and I have received a statement showing the benefits to be awarded in respect of the transfer payment.
- 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.
- I understand that the payment will be instead of the benefits due, or benefits that would have been due to me or for me as a result of me being a member of the transferring Scheme.
- I have not been given any advice by the Scheme or the Trustee about whether or not I should make this request and have had the opportunity to take independent financial advice related to this request.
- I understand that the Trustees and the Scheme will not consider whether or not the transfer that I have requested is in my interest and will not consider the interests of any of my relatives or dependants.
- I acknowledge that, in complying with my request, the Trustee and sponsoring employer(s) will be discharged of all liability to provide benefits to me in respect of the transfer value.
- I understand that there is no statutory requirement on the receiving scheme to provide for survivors benefits out of the transfer payment.
- I will protect the Trustees against any costs, claims, demands or expenses which may become due as a result of the payment.

I confirm that my date of birth shown on the first page is correct.

Signature: x



Date:

Print Name:

JACQUELINE JONES, 7-9-18

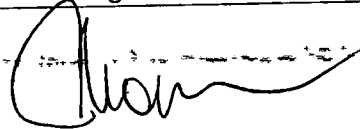
Transfer out scheme authority form

Name of the member:	JACQUELINE JONES
Reference number:	

On behalf of the Trustees or scheme administrator of the following arrangement, we give you permission to ask HM revenue & Customs for any information about the arrangement's registration status.

Name of arrangement:	JD CROUCH EXECUTIVE PENSION SCHEME
Address and postcode:	48 CHORLEY NEW ROAD BOLTON BL1 4AP
Pension scheme tax reference (PSTR/QROPS) number:	00828818 RA
Employer contracting-out number:	
Scheme contracting-out number:	

Signature:



Date: 25/09/2018

Print Name: MERLE OPEN

Please return the filled-in form to:

Park View Administration Ltd
Oak House
317 Golden Hill Lane
Leyland
Lancashire
PR25 2YJ
Tel: 0330 053 9150
info@parkviewadmin.co.uk