



Our Ref: LV/(KH)FTA46332

Pension Practitioner
JL Trading Ltd Pension Fund
Daws House
33-35 Daws Lane
London
NW7 4SD

25 September 2017

Your Plan Number(s): WA425278B
Member Name: Mr John Launder

Dear Sirs

We have received a request from the above to transfer their pension held with you to the LV= Personal Pension Scheme.

I have enclosed:

- authority from this customer to obtain information from you
- details of the policies to be transferred
- details of the information we need from you to complete the transfer
- your transfer forms completed by our customer, (if we have received them)

All the information you need to transfer is provided on the enclosed Transfer Information Sheet in line with the industry guidance in the ABI Statement of Good Practice for pension transfers.

When you send the transfer to us, please make sure your transfer declaration includes as much detail as possible. If there are gaps in the information this could delay the matching of funds to the new plan.

We'd be grateful if you could email or fax the transfer declaration to us in the first instance.

1. Please confirm the type of scheme the transfer is coming from and the HMRC Scheme Registration number.
2. Any benefits held as GMP or COSR funds with yourselves can only be received as a cash equivalent transfer value which we will treat as standard funds.

Enclosed - letter from Mr. J. Launder.

LV=, Retirement Solutions, Keynes House, Tilehouse Street, Hitchin, Herts, SG5 2DX. Tel: 0800 783 7533 (For Textphone dial 18001 first).
Fax: 0800 876 6368. We may record and/or monitor your calls for training and audit purposes.

LV= is a registered trade mark of Liverpool Victoria Friendly Society Limited (LVFS) and a trading style of the Liverpool Victoria group of companies. The Liverpool Victoria group of companies includes:
LVFS is authorised by the Prudential Regulation Authority, and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. NM Pensions Trustees Limited,
(registered in England No. 4299742), authorised and regulated by the Financial Conduct Authority and LV Equity Release Limited, (registered in England No 1951289),
authorised and regulated by the Financial Conduct Authority. Registered address for all companies: County Gates, Bournemouth BH1 2NF.
Telephone: (01202) 292333.



3. Has the policy been used to provide any benefits? If so please confirm:

- The original amount placed into drawdown.
- The date of the last income review, if in Capped Drawdown.
- The current maximum income limit, if in Capped Drawdown.
- Details of any payments made in the current policy year.
- The percentage of Lifetime Allowance already used in relation to the portion you are transferring to us.

4. Are you aware of any protection the policyholder may have including any Scheme Specific Protection if this relates to a block transfer? In the case of Scheme Specific Protection of lump sum rights, please confirm the fund value and value of lump sum rights as at 5 April 2006.

5. Are you aware of any existing divorce or bankruptcy orders affecting this transfer? If so please provide details.

6. If the transfer arises from a Pension Credit please confirm whether this is considered a qualifying or disqualifying Pension Credit.

7. If this is a beneficiary/nominee or successor drawdown, please provide us with the information.

There shouldn't be anything else required to make the transfer but if you do think something is missing, please call us straightaway on **0800 032 2990**.

Please confirm receipt of this letter to newbusiness.pensions@lv.com.

Yours sincerely

Kerry Butcher
Pensions Team

LV= Retirement Solutions

We're here to help on **0800 032 2990** from **9am to 5.30pm** Monday to Friday (excluding bank holidays). For textphone dial 18001 first. We may record and/or monitor your calls for training and audit purposes.

You can also contact us by email fta@lv.com or by fax on 0800 876 6306.



Transfer Information Sheet

Your Policy Number(s): WA425278B

NMPTL Account Number: 46332

Policy Holder:

Date of Birth:

NI Number:

Mr Launders

12/03/1958

WA425278B

We declare that the funds will be applied to the LV Personal Pension Scheme as a transfer value. The trustees of the scheme are NM Pensions Trustees Ltd and the transfer is being applied to an investment-regulated scheme registered under Chapter II Part IV of the Finance Act 2004.

Name of receiving scheme:

LV Personal Pension Scheme

Pension Scheme Tax Ref. (PSTR):

00691419RG

Registration:

Registered under Chapter II Part IV of the Finance Act 2004

ASCON No.

A7001329T

Cheques should be made payable to: NM Pensions Trustees Ltd

Address to send cheque to: NM Pensions Trustees Ltd, Pensions New Business, Pease House, Tilehouse Street, Hitchin, Herts, SG5 2DX

For BACS Payments, the payment should be transferred to the following account:

Account Name:

NM Pensions Trustees Ltd

Sort Code:

15-10-00

Account Number:

21718060

Bank Name and Address:

Royal Bank of Scotland

London City Office

Reference:

46332

Failure to quote the above NM Pensions Trustees Ltd reference may result in the monies being returned to you.

Declaration

Please note that NM Pensions Trustees Ltd does not complete transfer application forms. Full relevant information is provided on this Transfer Information Sheet. We believe that the individual client authorisation attached and our undertaking given below provide you with all the information that is needed to enable you to send payment and the relevant information to us immediately.

Signed for and on behalf

of NM Pensions Trustees Ltd

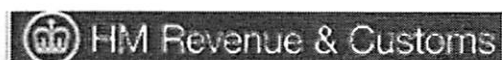
Position

Date

LV=, Retirement Solutions, Keynes House, Tilehouse Street, Hitchin, Herts, SG5 2DX. Tel: 0800 783 7533 (For Textphone dial 18001 first). Fax: 0800 876 6368. We may record and/or monitor your calls for training and audit purposes.

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- [Home](#)
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User Name: (A0018486)
PSTR 00691419RG

Pension Schemes

Your HMRC Services

- Pension Schemes
 - > [Welcome](#)
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 - > [View all Pension Schemes](#)
 - > [Advanced Scheme Search](#)
 - > [Registered Pension Schemes Manual](#)
- Registration
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Pension Scheme Summary

Pension Scheme Name **LV Personal Pension Scheme**
Pension Scheme Tax **00691419RG**
Reference (PSTR)
> [View current scheme details](#)
> [Amend scheme details](#)

Registration ?

Registration for Tax 24 Sep 2007 [View](#)
Relief at source 26 Jan 2010 [View](#) [Amend](#)

Reporting ?

Please select the type of report below:

- > [Accounting for Tax](#)
- > [Registered Pension Scheme Return](#)
- > [Event Report](#)

Scheme Administration

Pension Service Notices for Scheme ②

Please select an option below:

You have 22 notices for this Pension Scheme

> [Scheme Administrator management](#) ② > [View notices](#)

> [Practitioner management](#) ②

> [View submission receipts](#)

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Registration Details

Registration date	24 Sep 2007
Registered by	Liverpool Victoria
Address	County Gates Bournemouth BH1 2NF United Kingdom
Telephone	[REDACTED]
ID	A0018486
Email	[REDACTED]

Scheme Details

Pension Scheme Name	LV Personal Pension Scheme
Registered as a stakeholder scheme	No
Legal structure	Other - An overall trust within which specific assets are held as, or within, subfunds for each member
Likely number of members in next 12 months	51-10000
Is the scheme an investment-regulated pension scheme?	Yes
Do all the investments held by the scheme comprise contracts or policies of insurance?	No

Establisher details**Establisher 1**

Company or organisation name	Liverpool Victoria Friendly Society Limited
Address	County Gates Bournemouth
UK Postcode	BH1 2NF
Country	United Kingdom

Non-Deferred Annuity Declarations

Meets Criteria	Yes
Information Correct	Yes
No Unauthorised Payments	Yes

Declarations

Discharge Functions	Yes
No False Statements	Yes

Current scheme details

Pension Scheme Name LV Personal Pension Scheme

Deferred annuity contract / Retirement annuity No
contract made after 5 April 2006

Date scheme registered 24 Sep 2007

Name of Scheme Administrator who registered the scheme Liverpool Victoria

Scheme status

Open

Sub-scheme

No

Pension scheme structure

Other - An overall trust within which specific assets are held as, or within, subfunds for each member

The scheme is an investment regulated pension scheme ? Yes

Band of number of scheme members 51-10000

Registered for Relief at source

Yes

Occupational pension scheme ?

No

Country or Territory scheme established

United Kingdom



104 Church Street, Market Deeping,
Peterborough, PE6 8AL

Tel: 01778 342 291

Email: advice@liberty-partnership.co.uk

Web: www.liberty-partnership.co.uk

Pension Practitioner
Daws House
33-35 Daws Lane
London
NW7 4SD

Dear Sirs

Policy: SSAS Pension Scheme
John Launders
DOB: 12/03/1958
HI No. WA425278B

I refer you to the above pension policy and confirm that I wish to transfer 50% of my pension benefits to LV= Retirement Solutions.

I look forward to receiving confirmation that my pension has been transferred in due course and this letter also gives you authority to forward details of this transfer to my IFA, address above.

Yours faithfully

John Launders

Dated: 18/09/2017

Halfway Cottage
St Jidgey
Nr St Issey
Wadebridge
Cornwall
PL27 7RE



Liberty Partnership Ltd is registered in England with company registration number: 06223376
The company is authorised and regulated by the Financial Conduct Authority registration number: 472792



Transfers

Please complete this section if you want to make a transfer into your plan.

If you're transferring funds from two or more sources, we'll invest funds once all monies have been received and cleared.

How many pension schemes/insurers are you transferring from? 1

If you have transfers from more than three providers or schemes, please provide details on a photocopy of the next page.

Please provide full details of your pension schemes as this will enable us to get the funds to us as quickly as possible.

Please sign the declaration on page 5 once you've completed the details of all the transfers you wish to make.

Source One

Existing plan number/member reference

Full name of the current provider Pension Prochaires.com

Full name of pension scheme / trustee / scheme administrator JL Trading Ltd Pension Fund

Type of scheme (for example Personal Pension) SSAS

Address of transferring scheme Dowds House, 33-35 Dowds Lane,
London Postcode NW7 4SD

Telephone number (including area code)

Does the amount being transferred represent the full value of the plan?

☐ Yes

☒ No

Does your transfer include Guaranteed Minimum Pension (GMP) or contracted out salary related funds (section 9(2B) rights)?

☐ Yes

☒ No

Is this an in-specie transfer?

☐ Yes

☒ No

Is this a transfer of Pension Credit Rights, arising after divorce under the provisions of the Welfare Reform and Pensions Act 1999?

☐ Yes

☒ No

If yes, is the fund a disqualifying pension credit?

☐ Yes

☐ No

Are any of the funds you are transferring to LV=, subject to any existing or proposed order – For example, a trustee in bankruptcy order, earmarking, pension sharing order, trust or court order?

☐ Yes

☒ No

If there is an earmarking order attached to this plan we will be unable to accept this transfer. Pension earmarking is one of the options available on divorce or the dissolution of a civil partnership.

Approximate amount to be transferred: 50% of the fund value

Amount of fund from which you have not yet taken any benefits

£ 238,746.50 approx.

Amount of fund already in drawdown pension

£ /

Are any of the funds you are transferring to LV=, subject to any existing or proposed order – For example, a trustee in bankruptcy order, earmarking, pension sharing order, trust or court order?

☐ Yes

☐ No

If there is an earmarking order attached to this plan we will be unable to accept this transfer.

Pension earmarking is one of the options available on divorce or the dissolution of a civil partnership.

Approximate amount to be transferred:

Amount of fund from which you have not yet taken any benefits

£

Amount of fund already in drawdown pension

£

Declaration to transferring scheme/insurer

- I authorise and instruct you to transfer sums and assets from the plan(s) as listed in this application directly to Liverpool Victoria Friendly Society Limited (LV=) and/or the Trustees and to provide any instructions and/or discharge required by any relevant third party to do so.
- I authorise LV= and/or the Trustees, the current provider(s) and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to LV= and/or the Trustees.
- I authorise LV= and/or the Trustees, the current provider(s) and any employer paying contributions to any of the plan(s) as listed in this application to obtain from each other, and release to each other, any information that may be required, to enable the transfer of sums and assets to LV= and/or the Trustees.
- Until this application is accepted and complete, LV= and/or the Trustees' responsibility is limited to the return of the total payment(s) to the current provider(s).
- When payment is made to LV= and/or the Trustees as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in this application where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.

Declaration to transferring scheme/insurer and LV=

- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that LV= and/or the Trustee and the current provider(s) may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.

Applicant's name John Launders

Applicant's signature

J A Launders

Date 18/09/2017 (DD/MM/YYYY)

Personal Details

Please complete this application form in black ink and BLOCK CAPITALS.

Your title ☒ Mr / ☐ Mrs / ☐ Miss / ☐ Ms / ☐ Other

First name(s) in full John Adrian

Surname Launders

Address Halfway Cottage, St Jidgey, Nr St Issey
Wadebridge, Cornwall

Postcode PL27 7RE

Mobile phone number 07952 499471

Home telephone number

Email address j.launders@sky.com

If we have any questions while we're setting up your plan, we'll contact your financial adviser. We've asked for your contact details to keep you up to date on your application and for future correspondence.

Please provide your email address as we'd like to send correspondence to you electronically. If you'd prefer to receive items by post, please tick this box ☐

Don't worry, we won't use any of these details for marketing purposes.

National Insurance number WA4252786 (essential - we can't set your plan up without this)

Date of birth 12/03/1958 (DD/MM/YYYY)

We will confirm your name and age using online information agencies. Where we can't, we'll ask you to provide either your original birth certificate, or a certified copy of your passport or photo-card driving licence. If you are an overseas resident, please provide us with these details to enable us to carry out our online checks.

Nationality British

Are you male or female?

☒ Male

☐ Female

What is your marital status?

☐ Single ☒ Married/Civil Partner

☐ Widowed

☐ Divorced/ Dissolution

☐ Separated

What is your occupation?

Company Director

What is your intended annuity purchase age? 75 (Minimum age 55)

If you leave this box blank, we'll assume age 75 for any illustrations. If you're over age 75 when you apply we'll assume age 85.

Declaration of Health

We can only accept your transfer if you can state 'No' to BOTH of the following statements:

I have received a diagnosis from a registered medical practitioner that, due to a medical condition, my life expectancy is less than two years.

☒ No

☐ Yes

I am currently undergoing medical treatment or receiving palliative care/end of life care, whether in a hospital, hospice or at home, for a medical condition that could result in me having a life expectancy of less than two years.

☒ No

☐ Yes

If you are unsure how to answer any of the above questions you should seek the advice of your doctor.

I have been made aware that if I answer 'No' to the above statements and die within two years of LV= receiving the transfer, and in the opinion of LV's underwriters, it is clear that I should have answered 'Yes', LV= are likely to:

- Disregard any expression of wishes I have made in respect of death benefits, and
- pay all death benefits to my estate as a lump sum.



Our Ref: LV/(KH)FTA46336

Pension Practitioner
JL Trading Ltd Pension Fund
Daws House
33-35 Daws Lane
London
NW7 4SD

26 September 2017

Your Plan Number(s): YX131022D
Member Name: Mrs Diane Launder

Dear Sirs

We have received a request from the above to transfer their pension held with you to the LV= Personal Pension Scheme.

I have enclosed:

- authority from this customer to obtain information from you
- details of the policies to be transferred
- details of the information we need from you to complete the transfer
- your transfer forms completed by our customer, (if we have received them)

All the information you need to transfer is provided on the enclosed Transfer Information Sheet in line with the industry guidance in the ABI Statement of Good Practice for pension transfers.

When you send the transfer to us, please make sure your transfer declaration includes as much detail as possible. If there are gaps in the information this could delay the matching of funds to the new plan.

We'd be grateful if you could email or fax the transfer declaration to us in the first instance.

1. Please confirm the type of scheme the transfer is coming from and the HMRC Scheme Registration number.
2. Any benefits held as GMP or COSR funds with yourselves can only be received as a cash equivalent transfer value which we will treat as standard funds.

Enclosed - Client letter requesting only 50% funds transferred to LV=.

LV=, Retirement Solutions, Keynes House, Tilehouse Street, Hitchin, Herts, SG5 2DX. Tel: 0800 783 7533 (For Textphone dial 18001 first).
Fax: 0800 876 6368. We may record and/or monitor your calls for training and audit purposes.

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3. Has the policy been used to provide any benefits? If so please confirm:

- The original amount placed into drawdown.
- The date of the last income review, if in Capped Drawdown.
- The current maximum income limit, if in Capped Drawdown.
- Details of any payments made in the current policy year.
- The percentage of Lifetime Allowance already used in relation to the portion you are transferring to us.

4. Are you aware of any protection the policyholder may have including any Scheme Specific Protection if this relates to a block transfer? In the case of Scheme Specific Protection of lump sum rights, please confirm the fund value and value of lump sum rights as at 5 April 2006.

5. Are you aware of any existing divorce or bankruptcy orders affecting this transfer? If so please provide details.

6. If the transfer arises from a Pension Credit please confirm whether this is considered a qualifying or disqualifying Pension Credit.

7. If this is a beneficiary/nominee or successor drawdown, please provide us with the information.

There shouldn't be anything else required to make the transfer but if you do think something is missing, please call us straightaway on **0800 032 2990**.

Please confirm receipt of this letter to newbusiness.pensions@lv.com.

Yours sincerely



Kerry Butcher
Pensions Team

LV= Retirement Solutions

We're here to help on **0800 032 2990** from **9am to 5.30pm** Monday to Friday (excluding bank holidays). For textphone dial 18001 first. We may record and/or monitor your calls for training and audit purposes.

You can also contact us by email fta@lv.com or by fax on 0800 876 6306.



Transfer Information Sheet

Your Policy Number(s): YX131022D

NMPTL Account Number: 46336

Policy Holder:

Date of Birth:

NI Number:

Mrs Launders

27/04/1956

YX131022D

We declare that the funds will be applied to the LV Personal Pension Scheme as a transfer value. The trustees of the scheme are NM Pensions Trustees Ltd and the transfer is being applied to an investment-regulated scheme registered under Chapter II Part IV of the Finance Act 2004.

Name of receiving scheme:

LV Personal Pension Scheme

Pension Scheme Tax Ref. (PSTR):

00691419RG

Registration:

Registered under Chapter II Part IV of the Finance Act 2004

ASCON No.

A7001329T

Cheques should be made payable to: NM Pensions Trustees Ltd

Address to send cheque to: NM Pensions Trustees Ltd, Pensions New Business, Pease House, Tilehouse Street, Hitchin, Herts, SG5 2DX

For BACS Payments, the payment should be transferred to the following account:

Account Name:

NM Pensions Trustees Ltd

Sort Code:

15-10-00

Account Number:

21718060

Bank Name and Address:

Royal Bank of Scotland

London City Office

Reference:

46336

Failure to quote the above NM Pensions Trustees Ltd reference may result in the monies being returned to you.

Declaration

Please note that NM Pensions Trustees Ltd does not complete transfer application forms. Full relevant information is provided on this Transfer Information Sheet. We believe that the individual client authorisation attached and our undertaking given below provide you with all the information that is needed to enable you to send payment and the relevant information to us immediately.

Signed for and on behalf

of NM Pensions Trustees Ltd

Position

Date

LV=, Retirement Solutions, Keynes House, Tilehouse Street, Hitchin, Herts, SG5 2DX. Tel: 0800 783 7533 (For Textphone dial 18001 first). Fax: 0800 876 6368. We may record and/or monitor your calls for training and audit purposes.

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104 Church Street, Market Deeping,
Peterborough, PE6 8AL

Tel: 01778 342 291

Email: advice@liberty-partnership.co.uk

Web: www.liberty-partnership.co.uk

Pension Practitioner
Daws House
33-35 Daws Lane
London
NW7 4SD

Dear Sirs

Policy: SSAS Pension Scheme
Diane Launders
DOB: 27/04/1956
HI No. YX131022D

I refer you to the above pension policy and confirm that I wish to transfer 50% of my pension benefits to LV= Retirement Solutions.

I look forward to receiving confirmation that my pension has been transferred in due course and this letter also gives you authority to forward details of this transfer to my IFA, address above.

Yours faithfully

Diane Launders

Dated: 18/09/2017.

Halfway Cottage
St Jidgey
Nr St Issey
Wadebridge
Cornwall
PL27 7RE



Personal Details

Please complete this application form in black ink and BLOCK CAPITALS.

Your title Mr/Mrs/Miss/Ms/Other

First name(s) in full Diane Mary

Surname Launderers

Address Halfway Cottage, St Jidney, Nr St Issey,
Wadebridge, Cornwall

Postcode PL27 7RE

Mobile phone number 07952 499471

Home telephone number

Email address d.launderers@sky.com

If we have any questions while we're setting up your plan, we'll contact your financial adviser. We've asked for your contact details to keep you up to date on your application and for future correspondence.

Please provide your email address as we'd like to send correspondence to you electronically. If you'd prefer to receive items by post, please tick this box ☐

Don't worry, we won't use any of these details for marketing purposes.

National Insurance number 7X131022D (essential - we can't set your plan up without this)

Date of birth 27/04/1956 (DD/MM/YYYY)

We will confirm your name and age using online information agencies. Where we can't, we'll ask you to provide either your original birth certificate, or a certified copy of your passport or photo-card driving licence. If you are an overseas resident, please provide us with these details to enable us to carry out our online checks.

Nationality British

Are you male or female?

☐ Male

☒ Female

What is your marital status?

☐ Single ☒ Married/Civil Partner

☐ Widowed

☐ Divorced/ Dissolution

☐ Separated

What is your occupation? Company Director

What is your intended annuity purchase age? 75 (Minimum age 55)

If you leave this box blank, we'll assume age 75 for any illustrations. If you're over age 75 when you apply we'll assume age 85.

Declaration of Health

We can only accept your transfer if you can state 'No' to BOTH of the following statements:

I have received a diagnosis from a registered medical practitioner that, due to a medical condition, my life expectancy is less than two years.

☒ No

☐ Yes

I am currently undergoing medical treatment or receiving palliative care/end of life care, whether in a hospital, hospice or at home, for a medical condition that could result in me having a life expectancy of less than two years.

☒ No

☐ Yes

If you are unsure how to answer any of the above questions you should seek the advice of your doctor.

I have been made aware that if I answer 'No' to the above statements and die within two years of LV= receiving the transfer, and in the opinion of LV's underwriters, it is clear that I should have answered 'Yes', LV= are likely to:

- Disregard any expression of wishes I have made in respect of death benefits, and
- pay all death benefits to my estate as a lump sum.

Transfers

Please complete this section if you want to make a transfer into your plan.

If you're transferring funds from two or more sources, we'll invest funds once all monies have been received and cleared.

How many pension schemes/insurers are you transferring from?

If you have transfers from more than three providers or schemes, please provide details on a photocopy of the next page.

Please provide full details of your pension schemes as this will enable us to get the funds to us as quickly as possible.

Please sign the declaration on page 5 once you've completed the details of all the transfers you wish to make.

Source One

Existing plan number/member reference

Full name of the current provider Pension Practitioner.com

Full name of pension scheme / trustee / scheme administrator JL Trading Ltd Pension Fund

Type of scheme (for example Personal Pension) SSAS

Address of transferring scheme Daws House, 33-35 Daws Lane,
London Postcode NW7 4SD

Telephone number (including area code)

Does the amount being transferred represent the full value of the plan? ☐ Yes ☒ No

Does your transfer include Guaranteed Minimum Pension (GMP) or contracted out salary related funds (section 9(2B) rights)? ☐ Yes ☒ No

Is this an in-specie transfer? ☐ Yes ☒ No

Is this a transfer of Pension Credit Rights, arising after divorce under the provisions of the Welfare Reform and Pensions Act 1999? ☐ Yes ☒ No

If yes, is the fund a disqualifying pension credit? ☐ Yes ☐ No

Are any of the funds you are transferring to LV=, subject to any existing or proposed order – For example, a trustee in bankruptcy order, earmarking, pension sharing order, trust or court order? ☐ Yes ☒ No

If there is an earmarking order attached to this plan we will be unable to accept this transfer. Pension earmarking is one of the options available on divorce or the dissolution of a civil partnership.

Approximate amount to be transferred: 50% of the fund value

Amount of fund from which you have not yet taken any benefits £ 238,746.50 approx

Amount of fund already in drawdown pension £ —

Are any of the funds you are transferring to LV=, subject to any existing or proposed order – For example, a trustee in bankruptcy order, earmarking, pension sharing order, trust or court order?

☐ Yes

☐ No

If there is an earmarking order attached to this plan we will be unable to accept this transfer.

Pension earmarking is one of the options available on divorce or the dissolution of a civil partnership.

Approximate amount to be transferred:

Amount of fund from which you have not yet taken any benefits

£

Amount of fund already in drawdown pension

£

Declaration to transferring scheme/insurer

- I authorise and instruct you to transfer sums and assets from the plan(s) as listed in this application directly to Liverpool Victoria Friendly Society Limited (LV=) and/or the Trustees and to provide any instructions and/or discharge required by any relevant third party to do so.
- I authorise LV= and/or the Trustees, the current provider(s) and any financial intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to LV= and/or the Trustees.
- I authorise LV= and/or the Trustees, the current provider(s) and any employer paying contributions to any of the plan(s) as listed in this application to obtain from each other, and release to each other, any information that may be required, to enable the transfer of sums and assets to LV= and/or the Trustees.
- Until this application is accepted and complete, LV= and/or the Trustees' responsibility is limited to the return of the total payment(s) to the current provider(s).
- When payment is made to LV= and/or the Trustees as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in this application where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.

Declaration to transferring scheme/insurer and LV=

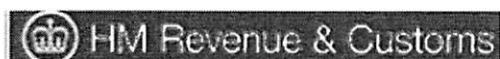
- I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that LV= and/or the Trustee and the current provider(s) may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original policy document(s) in return for the transfer of funds and I am unable to do so.

Applicant's name Diane Launder

Applicant's signature

Diane Launder

Date 18/09/2017 (DD/MM/YYYY)



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User Name: (A0018486)
PSTR 00691419RG

Pension Schemes

Your HMRC Services

- Pension Schemes
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- Registration
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- Scheme Administration
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 - > [Amend Scheme Details](#)
 - > [Scheme Administrator Management](#)
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 - > [View Submission Receipts](#)
- Pension Service Notices for Scheme
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- Quick Links
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Pension Scheme Summary

Pension Scheme Name **LV Personal Pension Scheme**
Pension Scheme Tax **00691419RG**
Reference (PSTR)
> [View current scheme details](#)
> [Amend scheme details](#)

Registration ?

Registration for Tax 24 Sep 2007 [View](#)

Relief at source 26 Jan 2010 [View](#) [Amend](#)

Reporting ?

Please select the type of report below:

> [Accounting for Tax](#)

> [Registered Pension Scheme Return](#)

> [Event Report](#)

Scheme Administration

Pension Service Notices for Scheme 22

Please select an option below:

You have 22 notices for this Pension Scheme

> [Scheme Administrator management](#) 2 > [View notices](#)

> [Practitioner management](#) 2

> [View submission receipts](#)

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Registration Details

Registration date	24 Sep 2007
Registered by	Liverpool Victoria
Address	County Gates Bournemouth BH1 2NF United Kingdom
Telephone	[REDACTED]
ID	A0018486
Email	[REDACTED]

Scheme Details

Pension Scheme Name	LV Personal Pension Scheme
Registered as a stakeholder scheme	No
Legal structure	Other - An overall trust within which specific assets are held as, or within, subfunds for each member
Likely number of members in next 12 months	51-10000
Is the scheme an investment-regulated pension scheme?	Yes
Do all the investments held by the scheme comprise contracts or policies of insurance?	No

Establisher details

Establisher 1

Company or organisation name	Liverpool Victoria Friendly Society Limited
Address	County Gates Bournemouth
UK Postcode	BH1 2NF
Country	United Kingdom

Non-Deferred Annuity Declarations

Meets Criteria	Yes
Information Correct	Yes
No Unauthorised Payments	Yes

Declarations

Discharge Functions	Yes
No False Statements	Yes

Current scheme details

Pension Scheme Name	LV Personal Pension Scheme
Deferred annuity contract / Retirement annuity contract made after 5 April 2006	No
Date scheme registered	24 Sep 2007
Name of Scheme Administrator who registered the scheme	Liverpool Victoria
Scheme status	Open
Sub-scheme	No
Pension scheme structure	Other - An overall trust within which specific assets are held as, or within, subfunds for each member
The scheme is an investment regulated pension scheme ?	Yes
Band of number of scheme members	51-10000
Registered for Relief at source	Yes
Occupational pension scheme ?	No
Country or Territory scheme established	United Kingdom