



**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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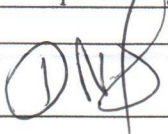
Name of transferring scheme/arrangement:	Retirement Account
Policy/Reference Number:	RA24159089
Member's Name:	Beverley Ellen Kneafsey
National Insurance Number:	NH757370C
Member's date of birth:	09-02-1966
The transferring scheme is a UK Registered Pension Scheme	

Name of receiving scheme and provider:	Kennedy Kneafsey SSAS / RC Administration Ltd
Reference(to be used on correspondence and payments):	B Kneafsey
HMRC reference number:	20002731RZ
Date of scheme registration:	1 April 2020
If the Scheme has been registered within the last 24 months a copy of your HMRC approval letter must be provided	
Payment details	
Cheque made payable to: Please arrange a bank transfer instead	
Address: Allied Irish Bank (GB) Four Hardman Street, Spinningfields, Manchester, M3, 3PL	Account Name: Kennedy Kneafsey SSAS Account Number: 04919088 Sort Code: 23-83-96
Reference to be included with payment (e.g. client name/policy number):	B Kneafsey

PENSION TRANSFER (please do not complete for open market option)	
1. We undertake that the receiving scheme is:	
	Please tick one <input checked="" type="checkbox"/>
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 checked="" type="checkbox"/>	Receiving Scheme Declaration (for pension transfer)
	a) We declare that the information given above and overleaf is true and correct. <input checked="" 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"/>
	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"/>
	d) If a non UK scheme, we: - 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)
	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:	
Company name:	RC Administration Ltd
Position:	Director
Date:	25/04/2021



Request for Transfer / Open Market Option Payment

I, Beverly Ellen Kneafsey hereby request St. James's Place 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.

Payment by St. James's Place in accordance with this request shall be a full and sufficient discharge of your liability under the said Retirement Account.

Crystallised Account: RA24159089

☒ **Transfer £52,498.18 to a Drawdown Pension (only full transfers allowed)**

☐ **Transfer for Annuity Purchase using the Open Market Option**

☐ **Full amount £52,498.18**

☐ **Partial net amount £.....**

Notes:

It is not possible to transfer to a Scheme Pension.

Name of Receiving Scheme **Kennedy Kneafsey SSAS**

Address of Receiving Scheme

..... **C/o RC Administration Limited**

..... **1A Park Lane**

..... **Poynton**

..... **Cheshire**

..... **SK12 1RD**

Signature of Mrs Beverly Ellen Kneafsey 

Date **21.4.21**

The value indicated is based on unit prices on 13 April 2021. The actual value will be based on prices on the date following receipt of all the required documentation.





**Transfer Request for Annuity Purchase via Open Market Option –
Lifetime Allowance Check for Mrs Beverly Ellen Kneafsey**

When you use your crystallised account RA24159089 to purchase an annuity, a further check has to be made against the Lifetime Allowance in respect of both the benefits under your St. James's Place Retirement Account, other benefits that you may have crystallised, together with benefits that you are crystallising now.

In order to carry out the calculation please advise: -

Have you applied for enhanced, primary, fixed or individual protection?

Yes

☐

No

☐

If 'Yes' please submit a certified copy (or the original) of the member protection certificate provided by HMRC.

Have you crystallised any benefits with other non-St. James's Place Pension Providers since the last crystallisation with St. James's Place?

Yes

☐

No

☐

If yes, what percentage of the Standard Lifetime Allowance has been taken?
(please provide documentary evidence to support this figure)

%

Please do not include any amounts that you are about to crystallise with St. James's Place UK plc.

Are you crystallising any other benefits within any other registered pension scheme at the same time as your benefits with St. James's Place?

Yes

☐

No

☐

If 'Yes' please advise:

Name of scheme

Policy number

Telephone number

Scheme address

And the order in which you wish to consider benefits to be taken for the purposes of the Lifetime Allowance.

Signature of Mrs Beverly Ellen Kneafsey ... *Beverly Ellen Kneafsey*

Date 21. 4. 21

Please return to St. James's Place Administration Centre, PO Box 9034, Chelmsford, CM99 2XA.

