



Planholder: Mrs Berlinda Jayne Rowland
National Insurance Number: NP675122D

Quote number: ETVQ00060437
Date of Birth: 22/11/1967

Part 1 - Receiving scheme payment details

To be completed by the receiving scheme trustees or administrator

Transferring scheme details

| | | | |
|---------------------------|---------|----------------|-----------------------|
| Plan/Reference number(s): | 9261238 | Contract type: | Personal Pension Plan |
|---------------------------|---------|----------------|-----------------------|

The transferring scheme(s) is / are a UK registered pension scheme.

Receiving scheme details

| |
|---|
| Name of receiving scheme/provider: <i>M and B Pension Fund</i> |
| Our reference: (to be used on all correspondence and payments) <i>M and B Pension Fund</i> |
| Please confirm either: direct credit (preferred) or cheque details |
| Direct credit details: (if appropriate) Sort code: Account number: Account payee name: |
| Cheque details: (if appropriate) Cheque made payable to: <i>M & B Pension Fund</i> Address: <i>THE ADMINISTRATOR</i> <i>Pension Practitioner .Com Limited</i> <i>33-35 Daws Lane</i> <i>Mill Hill, LONDON. NW7. 4SD.</i> <i>London NW7 4SD</i> Reference to be included: (ie plan number or member/planholder name) |

Part 2 - Pension transfer confirmation

(Please do NOT complete if an open market option is required.)

1. We undertake that the receiving scheme is: *(please tick one only)*

- A. Registered defined benefit occupational pension scheme
- B. Registered defined contribution occupational pension scheme
- C. Individual personal pension scheme
- D. Unsecured pension plan

☐
☒
☐
☐

2. We ~~are~~ are not* able to accept contracted-out benefits.

3. Contracting-out basis: Defined benefit/Defined contribution

4. ASCN ECON SCON

5. Receiving scheme registration number 00759295RW

* Delete as appropriate.

Receiving scheme declaration

- a We declare that the information we have given above and overleaf is true and complete.
- b We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with the requirements of the Finance Act 2004.
- c If contracted-out benefits are being transferred, they will be applied to provide appropriate contracted-out benefits.
- d Where the transfer comes from an unsecured pension plan, we confirm that the transfer will be applied accordingly to provide income withdrawals.

Date: 05/09/2010

Signed: [Signature]

Company name: Pension Practitioner Ltd

Position: For Scheme Administrator



Part 3 - AEGON transfer instruction

| | |
|-----------------------|----------------------------|
| Plan number(s): | 9261238 |
| Name: | Mrs Berlinda Jayne Rowland |
| Transfer value: | £52,060.57 |
| Non-protected rights: | £52,060.57 |
| Protected rights: | £0.00 |
| Date of quote: | 21/07/10 |

The transfer value is not guaranteed. The actual transfer value may vary from this quotation as the value of your investment could fall as well as rise before the transfer is completed. We'll calculate the actual transfer value at the date we receive all the necessary, completed documents.

Please complete the appropriate sections below.

To be completed by the planholder

I wish to transfer my benefits as follows:

- i Transfer both the **non-protected rights** and the **protected rights** to the receiving scheme/insurer below. Yes/No*
- ii Transfer only the **non-protected rights** to the receiving scheme/insurer below. Yes/No*
- iii Transfer only the **protected rights** to the receiving scheme/insurer below. Yes/No*

Receiving scheme/insurer: Trustees of M.A.O.B. Pension Fund

1. I agree that the actual value settled may be different from that quoted above due to fluctuations in my chosen investment fund, which could fall as well as rise.
2. I agree that payment of the transfer value will be a full discharge of AEGON's liability in respect of the rights being transferred under all the plans shown above.

Date 14/09/2010 Signed [Signature]



| | | |
|------------|------|--------|
| Contact us | Help | Logout |
|------------|------|--------|

User Name: (A0104108)

Pension Schemes

[Home](#)

Notice Details

Pension Schemes

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

Registration

- > [Register New Pension Scheme](#)
- > [Declare as Scheme Administrator for a Deferred Annuity Contract](#)

Administration

- > [View or amend your details](#)
- > [Add yourself as a Scheme Administrator](#)
- > [View Submission Receipts](#)
- > [View all my Notices](#)

Reporting

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

Individuals

- > [View LTA Certificate](#)

Quick Links

- > [The Pensions Regulator](#)
- > [VAT](#)
- > [Your Online Services](#)
- > [Make a Payment](#)
- > [Logout](#)

Lancashire PVCU Trade
FramesLimited
c/o Pension Practitioner .Com
Daws House
33-35 Daws Lane
London
United Kingdom
NW7 4SD

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel: **0845 600 2622**
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The M and B Pension Fund has been registered by HM Revenue & Customs (HMRC) on **13/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759295RW**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

[Print this notice >](#)
[Return to notices overview >](#)



Planholder: Mrs Belinda Jayne Rowland
National Insurance Number: NP675122D

Quote number: ETVQ00060439
Date of Birth: 22/11/1967

Part 1 - Receiving scheme payment details

To be completed by the receiving scheme trustees or administrator

Transferring scheme details

| | | | |
|---------------------------|---------|----------------|-----------------------|
| Plan/Reference number(s): | 9263402 | Contract type: | Personal Pension Plan |
|---------------------------|---------|----------------|-----------------------|

The transferring scheme(s) is / are a UK registered pension scheme.

Receiving scheme details

| | |
|---|--|
| Name of receiving scheme/provider: <i>TRUSTEES OF M&B PENSION FUND</i> | |
| Our reference: (to be used on all correspondence and payments) <i>M&B Pension Fund</i> | |
| Please confirm either: direct credit (preferred) or cheque details | |
| Direct credit details: (if appropriate) Sort code: Account number: Account payee name: | |
| Cheque details: (if appropriate) Cheque made payable to: <i>M&B Pension Fund</i> Address: <i>THE ADMINISTRATOR</i> <i>Pension Practitioner . Com Limited</i> <i>33-35 Daws Lane</i> <i>Mill Hill</i> <i>London NW7 4SD</i> | |
| Reference to be included: (ie plan number or member/planholder name) | |

Part 2 - Pension transfer confirmation

(Please do NOT complete if an open market option is required.)

1. We undertake that the receiving scheme is: *(please tick one only)*

- A. Registered defined benefit occupational pension scheme
- B. Registered defined contribution occupational pension scheme
- C. Individual personal pension scheme
- D. Unsecured pension plan

☐
☒
☐
☐

2. We ~~are~~/are not* able to accept contracted-out benefits.

3. Contracting-out basis: Defined benefit/Defined contribution

4. ASCN ECON SCON

5. Receiving scheme registration number 00759295RW

* Delete as appropriate.

Receiving scheme declaration

- a We declare that the information we have given above and overleaf is true and complete.
- b We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with the requirements of the Finance Act 2004.
- c If contracted-out benefits are being transferred, they will be applied to provide appropriate contracted-out benefits.
- d Where the transfer comes from an unsecured pension plan, we confirm that the transfer will be applied accordingly to provide income withdrawals.

Date: 05/09/2010

Signed: [Signature]

Company name: PENSION PRACTITIONER.COM LTD.

Position: FOR SCHEME ADMINISTRATOR



Part 3 - AEGON transfer instruction

| | |
|-----------------------|---------------------------|
| Plan number(s): | 9263402 |
| Name: | Mrs Belinda Jayne Rowland |
| Transfer value: | £51,295.61 |
| Non-protected rights: | £51,295.61 |
| Protected rights: | £0.00 |
| Date of quote: | 21/07/10 |

The transfer value is not guaranteed. The actual transfer value may vary from this quotation as the value of your investment could fall as well as rise before the transfer is completed. We'll calculate the actual transfer value at the date we receive all the necessary, completed documents.

Please complete the appropriate sections below.

To be completed by the planholder

I wish to transfer my benefits as follows:

- i Transfer both the **non-protected rights** and the **protected rights** to the receiving scheme/insurer below. Yes/No*
- ii Transfer only the **non-protected rights** to the receiving scheme/insurer below. Yes/No*
- iii Transfer only the **protected rights** to the receiving scheme/insurer below. Yes/No*

Receiving scheme/insurer:

M and B Pension Fund

1. I agree that the actual value settled may be different from that quoted above due to fluctuations in my chosen investment fund, which could fall as well as rise.
2. I agree that payment of the transfer value will be a full discharge of AEGON's liability in respect of the rights being transferred under all the plans shown above.

Date 14/09/2010

Signed

[Signature]

| | | |
|------------|------|--------|
| Contact us | Help | Logout |
|------------|------|--------|

User Name: (A0104108)

Pension Schemes

[Home](#)

Notice Details

Pension Schemes

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

Registration

- > [Register New Pension Scheme](#)
- > [Declare as Scheme Administrator for a Deferred Annuity Contract](#)

Administration

- > [View or amend your details](#)
- > [Add yourself as a Scheme Administrator](#)
- > [View Submission Receipts](#)
- > [View all my Notices](#)

Reporting

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

Individuals

- > [View LTA Certificate](#)

Quick Links

- > [The Pensions Regulator](#)
- > [VAT](#)
- > [Your Online Services](#)
- > [Make a Payment](#)
- > [Logout](#)

Lancashire PVCU Trade
FramesLimited
c/o Pension Practitioner .Com
Daws House
33-35 Daws Lane
London
United Kingdom
NW7 4SD

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel: **0845 600 2622**
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The M and B Pension Fund has been registered by HM Revenue & Customs (HMRC) on **13/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759295RW**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

[Print this notice >](#)
[Return to notices overview >](#)



Planholder: Mr Mark Peter Rowland
National Insurance Number: NA479741C

Quote number: ETVQ00060436
Date of Birth: 03/08/1963

Part 1 - Receiving scheme payment details

To be completed by the receiving scheme trustees or administrator

Transferring scheme details

| | | | |
|---------------------------|---------|----------------|-----------------------|
| Plan/Reference number(s): | 9264427 | Contract type: | Personal Pension Plan |
|---------------------------|---------|----------------|-----------------------|

The transferring scheme(s) is / are a UK registered pension scheme.

Receiving scheme details

| | |
|---|--|
| Name of receiving scheme/provider: <i>M&B Pension Fund</i> | |
| Our reference: (to be used on all correspondence and payments) <i>M&B Pension Fund</i> | |
| Please confirm either: direct credit (preferred) or cheque details | |
| Direct credit details: (if appropriate) Sort code: Account number: Account payee name: | |
| Cheque details: (if appropriate) Cheque made payable to: <i>M&B Pension Fund</i> Address: <i>THE ADMINISTRATOR Pension Practitioner .Com Limited 33-35 Daws Lane Mill Hill London NW7 4SD</i> Reference to be included: (ie plan number or member/planholder name) <i>M&B Pension Fund</i> | |

Part 2 - Pension transfer confirmation

(Please do NOT complete if an open market option is required.)

1. We undertake that the receiving scheme is: *(please tick one only)*

- A. Registered defined benefit occupational pension scheme
- B. Registered defined contribution occupational pension scheme
- C. Individual personal pension scheme
- D. Unsecured pension plan

| |
|-------------------------------------|
| <input type="checkbox"/> |
| <input checked="" type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

2. We ~~are~~are not* able to accept contracted-out benefits.

3. Contracting-out basis: Defined benefit/Defined contribution

4. ASCN ECON SCON

5. Receiving scheme registration number

* Delete as appropriate.

Receiving scheme declaration

- a We declare that the information we have given above and overleaf is true and complete.
- b We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with the requirements of the Finance Act 2004.
- c If contracted-out benefits are being transferred, they will be applied to provide appropriate contracted-out benefits.
- d Where the transfer comes from an unsecured pension plan, we confirm that the transfer will be applied accordingly to provide income withdrawals.

Date: 05/09/2010

Signed: 

Company name: Pension PRAXISONER Ltd

Position: FOR SYSTEM ADMINISTRATION



Part 3 - AEGON transfer instruction

| | |
|-----------------------|-----------------------|
| Plan number(s): | 9264427 |
| Name: | Mr Mark Peter Rowland |
| Transfer value: | £51,402.71 |
| Non-protected rights: | £51,402.71 |
| Protected rights: | £0.00 |
| Date of quote: | 21/07/10 |

The transfer value is not guaranteed. The actual transfer value may vary from this quotation as the value of your investment could fall as well as rise before the transfer is completed. We'll calculate the actual transfer value at the date we receive all the necessary, completed documents.

Please complete the appropriate sections below.

To be completed by the planholder

I wish to transfer my benefits as follows:

- i Transfer both the **non-protected rights** and the **protected rights** to the receiving scheme/insurer below. Yes/No*
- ii Transfer only the **non-protected rights** to the receiving scheme/insurer below. Yes/No*
- iii Transfer only the **protected rights** to the receiving scheme/insurer below. Yes/No*

Receiving scheme/insurer:

1. I agree that the actual value settled may be different from that quoted above due to fluctuations in my chosen investment fund, which could fall as well as rise.
2. I agree that payment of the transfer value will be a full discharge of AEGON's liability in respect of the rights being transferred under all the plans shown above.

Date 14/09/2010 Signed 



| | | |
|------------|------|--------|
| Contact us | Help | Logout |
|------------|------|--------|

Pension Schemes

User Name: (A0104108)

Home

Notice Details

Pension Schemes

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

Registration

- > [Register New Pension Scheme](#)
- > [Declare as Scheme Administrator for a Deferred Annuity Contract](#)

Administration

- > [View or amend your details](#)
- > [Add yourself as a Scheme Administrator](#)
- > [View Submission Receipts](#)
- > [View all my Notices](#)

Reporting

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

Individuals

- > [View LTA Certificate](#)

Quick Links

- > [The Pensions Regulator](#)
- > [VAT](#)
- > [Your Online Services](#)
- > [Make a Payment](#)
- > [Logout](#)

Lancashire PVCU Trade
FramesLimited
c/o Pension Practitioner .Com
Daws House
33-35 Daws Lane
London
United Kingdom
NW7 4SD

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel: **0845 600 2622**
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The M and B Pension Fund has been registered by HM Revenue & Customs (HMRC) on **13/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759295RW**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

[Print this notice >](#)
[Return to notices overview >](#)



Planholder: Mr Mark Peter Rowland
National Insurance Number: NA479741C

Quote number: ETVQ00060435
Date of Birth: 03/08/1963

Part 1 - Receiving scheme payment details

To be completed by the receiving scheme trustees or administrator

Transferring scheme details

| | | | |
|---------------------------|---------|----------------|-----------------------|
| Plan/Reference number(s): | 9261243 | Contract type: | Personal Pension Plan |
|---------------------------|---------|----------------|-----------------------|

The transferring scheme(s) is /are a UK registered pension scheme.

Receiving scheme details

| |
|--|
| Name of receiving scheme/provider: |
| M and B Pension Fund |
| Our reference: (to be used on all correspondence and payments) |
| m & B Pension Fund |
| Please confirm <i>either</i> : direct credit (preferred) or cheque details |
| Direct credit details: (if appropriate) |
| Sort code: |
| Account number: |
| Account payee name: |
| Cheque details: (if appropriate) |
| Cheque made payable to: |
| M & B Pension Fund |
| Address: |
| THE ADMINISTRATOR Pension Practitioner .Com Limited 33-35 Daws Lane Mill Hill London NW7 4SD |
| Reference to be included: (ie plan number or member/planholder name) |
| m & B Pension Fund |

Part 2 - Pension transfer confirmation

(Please do NOT complete if an open market option is required.)

1. We undertake that the receiving scheme is: *(please tick one only)*

- A. Registered defined benefit occupational pension scheme
- B. Registered defined contribution occupational pension scheme
- C. Individual personal pension scheme
- D. Unsecured pension plan

☐
☒
☐
☐

2. We ~~are~~are not* able to accept contracted-out benefits.

3. Contracting-out basis: Defined benefit/Defined contribution

4. ASCN ECON SCON

5. Receiving scheme registration number

* Delete as appropriate.

Receiving scheme declaration

- a We declare that the information we have given above and overleaf is true and complete.
- b We confirm that the transfer value will be applied to provide relevant pension benefits that are consistent with the requirements of the Finance Act 2004.
- c If contracted-out benefits are being transferred, they will be applied to provide appropriate contracted-out benefits.
- d Where the transfer comes from an unsecured pension plan, we confirm that the transfer will be applied accordingly to provide income withdrawals.

Date: 05/05/2010

Signed: [Signature]

Company name: PENSION PRACTITIONER - COMM LTD

Position: FULL TIME ADMINSTRATOR



Part 3 - AEGON transfer instruction

| | |
|-----------------------|-----------------------|
| Plan number(s): | 9261243 |
| Name: | Mr Mark Peter Rowland |
| Transfer value: | £52,060.57 |
| Non-protected rights: | £52,060.57 |
| Protected rights: | £0.00 |
| Date of quote: | 21/07/10 |

The transfer value is not guaranteed. The actual transfer value may vary from this quotation as the value of your investment could fall as well as rise before the transfer is completed. We'll calculate the actual transfer value at the date we receive all the necessary, completed documents.

Please complete the appropriate sections below.

To be completed by the planholder

I wish to transfer my benefits as follows:

- i Transfer both the **non-protected rights** and the **protected rights** to the receiving scheme/insurer below. Yes/No*
- ✓ ii Transfer only the **non-protected rights** to the receiving scheme/insurer below. Yes/~~No~~*
- iii Transfer only the **protected rights** to the receiving scheme/insurer below. Yes/No*

Receiving scheme/insurer:

M & B Pension Fund

1. I agree that the actual value settled may be different from that quoted above due to fluctuations in my chosen investment fund, which could fall as well as rise.

2. I agree that payment of the transfer value will be a full discharge of AEGON's liability in respect of the rights being transferred under all the plans shown above.

Date 14/09/2010

Signed



| | | |
|------------|------|--------|
| Contact us | Help | Logout |
|------------|------|--------|

Pension Schemes

User Name: (A0104108)

[Home](#)

Notice Details

Pension Schemes

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

Registration

- > [Register New Pension Scheme](#)
- > [Declare as Scheme Administrator for a Deferred Annuity Contract](#)

Administration

- > [View or amend your details](#)
- > [Add yourself as a Scheme Administrator](#)
- > [View Submission Receipts](#)
- > [View all my Notices](#)

Reporting

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

Individuals

- > [View LTA Certificate](#)

Quick Links

- > [The Pensions Regulator](#)
- > [VAT](#)
- > [Your Online Services](#)
- > [Make a Payment](#)
- > [Logout](#)

Lancashire PVCU Trade
FramesLimited
c/o Pension Practitioner .Com
Daws House
33-35 Daws Lane
London
United Kingdom
NW7 4SD

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel: **0845 600 2622**
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The M and B Pension Fund has been registered by HM Revenue & Customs (HMRC) on **13/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759295RW**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

[Print this notice >](#)
[Return to notices overview >](#)

Personal Pension Plan - Transfer claim form

Please ensure that sections 2, 3.4 and 5 are completed by the adviser or receiving scheme and that any additional documents required are enclosed before returning the form. Please complete a transfer claim form for each plan to be transferred.

Section 1: Plan holder personal details

Mr Mark Rowland
Bentley Manor
Bentley Hall Road
High Street
Bury
Lancashire
BL8 3AQ

Plan number: P30644-826-P01/PB

Please confirm your date of birth

3-8-63

Please confirm your daytime telephone contact number

Section 2: Details of benefits to be transferred

Non protected rights only



Section 3: Details of receiving scheme - to be completed by the adviser or the receiving scheme

Please note that the planholder must be either a member of the receiving scheme or the receiving scheme is the planholders own policy for the receiving scheme to accept the transfer.

Please place a tick in the box next to the receiving scheme type:

1: A pension scheme that was fully approved by HM Revenue & Customs (HMRC) before 6 April 2006 and became a registered pension scheme on that date under Chapter 2, Part 4 Finance Act 2004 (as amended).



2: A registered pension scheme under Chapter 2, Part 4 Finance Act 2004 (as amended).



If the Scheme is one of the above, is it one of the following;

a. An Occupational Scheme which is a Contracted Out Salary Related (Final Salary) Scheme (COSR)?

☐

b. An Occupational Scheme which is a Contracted In Final Salary Scheme?

☐

Section 4: Receiving scheme approval/registration - to be completed by the adviser or the receiving scheme

What is the HMRC Approval/Registration Number?

0075929SRW

If the Scheme does not have a HMRC Approval/Registration number, please indicate type of Scheme

.....

Section 5: Payment details - to be completed by the adviser or the receiving scheme

| | |
|----------------------|-----------------------------------|
| Cheque payable to *: | M & B Pension Fund |
| Address: | |
| | Pension Practitioner .Com Limited |
| | 33-35 Daws Lane |
| | Mill Hill |
| | London NW7 4SD |
| Post code: | |
| Reference: | M & B Pension Fund |
| Contact name: | BRAD OATS , |

*This must be the provider /insurer of the receiving Scheme or, if there is no provider/insurer, the Scheme Administrator (for example, Trustees). If payment is to be made to the Scheme Administrator, documentary evidence showing the Scheme Administrator's link with the receiving scheme must be provided, for instance, a copy of the scheme's letter of approval/registration.

Section 6: Declaration - to be completed by the plan holder

I understand that the final transfer value will be calculated on the next valuation date following receipt of all documentation and information required.

I accept that payment by Zurich Assurance Ltd. in accordance with this authority, shall constitute full satisfaction and discharge of all claims whatsoever, in law and in equity, and I undertake and agree to hold harmless and keep indemnified Zurich Assurance Ltd from and against all claims and demands of any person whatsoever by virtue of the said plan and all expenses arising there from.

I have not been made bankrupt since acquiring the plan.

Plan holder's
signature:

Name: Mark Rowland

Date:

14/9/2010

| | | |
|------------|------|--------|
| Contact us | Help | Logout |
|------------|------|--------|

Pension Schemes

User Name: (A0104108)

[Home](#)

Notice Details

Pension Schemes

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

Registration

- > [Register New Pension Scheme](#)
- > [Declare as Scheme Administrator for a Deferred Annuity Contract](#)

Administration

- > [View or amend your details](#)
- > [Add yourself as a Scheme Administrator](#)
- > [View Submission Receipts](#)
- > [View all my Notices](#)

Reporting

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

Individuals

- > [View LTA Certificate](#)

Quick Links

- > [The Pensions Regulator](#)
- > [VAT](#)
- > [Your Online Services](#)
- > [Make a Payment](#)
- > [Logout](#)

Lancashire PVCU Trade
FramesLimited
c/o Pension Practitioner .Com
Daws House
33-35 Daws Lane
London
United Kingdom
NW7 4SD

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel: **0845 600 2622**
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The M and B Pension Fund has been registered by HM Revenue & Customs (HMRC) on **13/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759295RW**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

[Print this notice >](#)
[Return to notices overview >](#)

Retirement Annuity Contract - Transfer claim form

Please ensure that sections 2, 3.4 and 5 are completed by the adviser or receiving scheme and that any additional documents required are enclosed before returning the form. Please complete a transfer claim form for each plan to be transferred.

Section 1: Plan holder personal details

Mr Mark Rowland
Bentley Manor
Bentley Hall Road
High Street
Bury
Lancashire
BL8 3AQ

Plan number: P11159-246-001/DKA

Please confirm your date of birth

3 - 8 - 63

Please confirm your daytime telephone contact number

Section 2: Details of receiving scheme - to be completed by the adviser or the receiving scheme

Please note that, for the receiving scheme to accept the transfer, the planholder must be either a member of the receiving scheme, with the transfer being invested for the planholder, or the receiving scheme is the planholder's own policy.

Please place a tick in the box next to the receiving scheme type:

1: A pension scheme that was fully approved by HM Revenue & Customs (HMRC) before 6 April 2006 and became a registered pension scheme on that date under Chapter 2, Part 4 Finance Act 2004 (as amended).

☐

2: A registered pension scheme under Chapter 2, Part 4 Finance Act 2004 (as amended).

☒

If the Scheme is one of the above, is it one of the following;

a. An Occupational Scheme which is a Contracted Out Salary Related (Final Salary) Scheme (COSR)?

☐

b. An Occupational Scheme which is a Contracted In Final Salary Scheme?

☐

Section 3: Receiving scheme approval - to be completed by the adviser or the receiving scheme

What is the HMRC Approval/Registration Number?

00759295RW

If the Scheme does not have a HMRC Approval/Registration number, please indicate type of Scheme

.....

Section 4: Payment details - to be completed by the adviser or the receiving scheme

| | |
|----------------------|-----------------------------------|
| Cheque payable to *: | M2B Pension Fund |
| Address: | |
| | Pension Practitioner .Com Limited |
| | 33-35 Daws Lane |
| | Mill Hill |
| | London NW7 4SD |
| Post code: | |
| Reference: | M2B Pension Fund |
| Contact name: | BRAD DAVIS , |

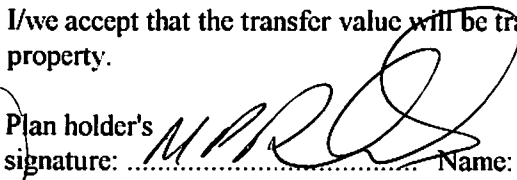
*This must be the provider /insurer of the receiving Scheme or, if there is no provider/insurer, the Scheme Administrator (for example, Trustees). If payment is to be made to the Scheme Administrator, documentary evidence showing the Scheme Administrator's link with the receiving scheme must be provided, for instance, a copy of the scheme's letter of approval/registration.

Section 5: Declaration - to be completed by the plan holder

I request that the plan is endorsed with Zurich Assurance Ltd's standard terms and conditions for the making of transfer payments (a copy of the Endorsement is available on request). I understand that the final transfer value will be calculated on the next valuation date following receipt of all documentation and information required. I accept that payment by Zurich Assurance Ltd, in accordance with this authority, shall constitute full satisfaction and discharge of all claims whatsoever, in law and in equity, and I undertake and agree to hold harmless and keep indemnified Zurich Assurance Ltd from and against all claims and demands of any person whatsoever by virtue of the said plan and all expenses arising there from.

I have not been made bankrupt since acquiring the plan.

I/we accept that the transfer value will be transferred free of trust and will no longer form part of the trust property.

Plan holder's
signature: 

Name: Mark Rowland

Date: 14/9/2010

| | | |
|----------------------------|----------------------|------------------------|
| Contact us | Help | Logout |
|----------------------------|----------------------|------------------------|

User Name: (A0104108)

Pension Schemes

[Home](#)

Notice Details

Pension Schemes

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

Registration

- > [Register New Pension Scheme](#)
- > [Declare as Scheme Administrator for a Deferred Annuity Contract](#)

Administration

- > [View or amend your details](#)
- > [Add yourself as a Scheme Administrator](#)
- > [View Submission Receipts](#)
- > [View all my Notices](#)

Reporting

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

Individuals

- > [View LTA Certificate](#)

Quick Links

- > [The Pensions Regulator](#)
- > [VAT](#)
- > [Your Online Services](#)
- > [Make a Payment](#)
- > [Logout](#)

Lancashire PVCU Trade
FramesLimited
c/o Pension Practitioner .Com
Daws House
33-35 Daws Lane
London
United Kingdom
NW7 4SD

Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG

Tel: **0845 600 2622**
Monday to Friday 09.00 - 17.00

Fax: **0115 974 1480**

ACKNOWLEDGEMENT OF REGISTRATION FOR TAX RELIEF AND EXEMPTIONS

The M and B Pension Fund has been registered by HM Revenue & Customs (HMRC) on **13/07/2010**. Tax relief and exemptions are due from this date.

Your Pension Scheme Tax Reference (PSTR) is **00759295RW**. You should use this when you want to view the scheme details online and in all future communications with HMRC.

HMRC may carry out checks to ensure that the conditions to be a registered pension scheme for tax relief and exemptions are met and continue to be met.

Pension Cert 1

IMS 08/05

[Print this notice >](#)
[Return to notices overview >](#)