



ST. JAMES'S PLACE

WEALTH MANAGEMENT

Administration Centre PO Box 9034

Chelmsford CM99 2XA

Telephone: 0800 027 1030 www.sjp.co.uk

Carlton James Pension Administration
Lime Kiln House
Lime Kiln
Royal Wootton Bassett
SN4 7HF

10 May 2019

Dear Sir/Madam

Policy / Reference Number: NW278133D

Account Owner: Mrs Kelli Salone

The above client wishes to transfer their benefits from your arrangement to the St. James's Place Personal Retirement Plan. This is a UK Registered Pension Scheme which was formerly approved as an Appropriate Personal Pension Scheme. The Pension Scheme Tax Reference number is 00616190RZ and its ASCN is A7001200H.

Please arrange for the payment to be sent to us by BACS to the following details:

Account Name: St James's Place UK Plc

Sort code: 20-13-42

Account No: 50642371

If payment by BACS is not appropriate please send a cheque payable to St. James's Place UK plc.

Any correspondence should be sent to:

St. James's Place UK plc

Administration Centre

PO Box 9034

Chelmsford

CM99 2XA

When sending the payment please quote RA24239329

If you need any further information please call us on 0800 027 1030 or email us at NBS@sjpadmin.co.uk quoting the above number.

Yours faithfully

Customer Service Executive - St. James's Place UK Plc



CARLTON JAMES

Receiving Scheme Declaration Form

Section 1

Member Name

Kelli SALONE

Section 2

We undertake that the receiving Scheme is:

- A UK Registered Scheme:



This is a scheme which is registered by HM Revenue & Customs under Part 4 of the Finance Act 2004 (including existing scheme that automatically acquire this new registered status on 6h April 2006). The Scheme PSTR/~~SF Number~~ Is (Delete as Appropriate):

00616190 RZ

- Type of scheme:



A registered personal pension scheme



A Small Self Administered Scheme (SSAS)



Self invested personal pension (SIPP)



Occupational defined contribution

- A Qualifying Recognised Overseas Scheme:



For a scheme to hold 'Qualifying' Status it must evidence that:

You have achieved a letter of acceptance from a HMRC Audit and the Pension Scheme Services to confirming your registered status as a Qualifying Recognised Overseas Scheme.

Carlton James may be unable to assist in a request for the transfer of benefits to another type of scheme.

Please make sure this form is filled in, signed and dated. Once the receiving scheme declaration and supporting documentation have been evidenced and satisfies our due diligence, payment will be made via BACS. If you're unable to accept BACS please notify us at your earliest convenience.

Section 3:

New Provider Details:

Scheme Name:

St James's Place Personal Retirement Plan

Reference Number: (If Known)

RA24239329

Bank Name:

Barclays

Account Holder Name:

St James's Place UK Plc

Account Number:

50642371

Sort Code:

20-13-42

BACS Payment Reference:
(If applicable)

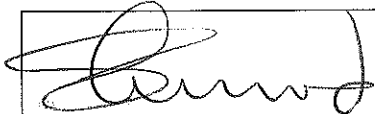
RA24239329

Declaration

☒ We confirm that the information given in this 'Receiving Scheme Declaration Form' is accurate to the best of ~~my~~ our knowledge and belief.

Signed for and on behalf of the receiving
scheme:

Dated:



10/05/2019

Print Name:

Position:

RICHARD GARHA

Associate

Private and Confidential

Carlton James Pension Administration
Lime Kiln House
Royal Wootton Bassett
SN4 7HF

1st May 2019

Dear Carlton James Pension Administration,

RE: Ms K Salone – NW278133D

I, Miss Kelli Salone confirm my intention to transfer my pension policy with you to St James's Place as policyholder and trustee.

Kind Regards

A handwritten signature in blue ink, consisting of a large, stylized 'K' followed by a horizontal stroke and a small loop.

Kelli Salone



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User Name: (A0010062)
PSTR 00616190RZ

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Pension Scheme Name St. James's Place Personal Retirement Plan
Deferred annuity contract / Retirement No
annuity contract made after 5 April
2006
Date scheme registered 05 Apr 2006
Name of Scheme Administrator who registered the scheme St. James's Place UK PLC

Scheme status Open
Sub-scheme No

Pension scheme structure
The scheme is an investment regulated No
pension scheme 
Band of number of scheme members

Registered for Relief at source No
Occupational pension scheme  No

Country or Territory scheme established UNKNOWN

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Inland
Revenue

National Insurance
Contributions Office

Inland Revenue
National Insurance Contributions Office
Services to Pensions Industry
Personal Pensions
Room BP4102
Benton Park View
Newcastle upon Tyne
NE98 1ZZ

The Scheme Administrator
St. James Place Personal Retirement Plan
St. James Place House
Dollar Street
Cirencester
GL7 2AQ

Telephone: 084591 or 0191 22 50010
Fax: 084591 or 0191 22 50032

If you have access to textphone equipment you can use
Textphone: 084591 or 0191 22 58508
Calls to the 084591 number will be charged at Local Call rates
Your ref:

Our ref: Personal Pensions Team 3
Please use this reference if you write or call

Date: 9 September 2002

RECEIVED

12 Sep 2002

Dear Sir

APPROPRIATE PERSONAL PENSION
VARIATION TO SCHEME NAME
A7001200H

Thank you for your request to change the name on the above Appropriate personal Pension Plan.

I am pleased to confirm that our records have now been changed as requested and please find enclose a new Contracting - Out certificate one copy for the scheme records and one copy for the administrator.

I hope this clarifies the situation, however if I can be of any further assistance please do not hesitate to contact me.

Yours sincerely

KEN WALTON
PERSONAL PENSIONS 3

Improving our service to you

We are always pleased to receive your comments and suggestions about how we can improve our service. Please contact us at the address or telephone number shown if you have any comments or are unhappy with our service.

OCCUPATIONAL PENSIONS BOARD

VARIATION CERTIFICATE

APPROPRIATE SCHEME CERTIFICATE

(Issued under Part I of the Social Security Act 1996/Part II of the Social Security
(Northern Ireland) Order 1986)

OPB Ref: 998151

Issued to

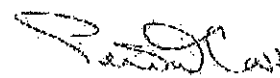
J Rothschild Assurance Personnel Pension Plan

Administration Centre
P O Box 64
Stirling
FK9 4YS

In response to an application dated 06/12/91 it is
hereby certified that with effect from 20/07/94, the
above named scheme is an appropriate personal
pension scheme.

Date

22/07/94



Mr Peter D Carr, CBE

Chairman

Issued by the Occupational Pensions Board, Lynwood Road, Thomas Ditch, Surrey KT17 0DP

OP 1 (PP) (1/94)

HMRC: Pension Schemes Service

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Pension Scheme Summary

Pension Scheme Name **St. James's Place Retirement Plan**
Pension Scheme Tax **00616190RZ**
Reference (PSTR)
> [View current scheme details](#)

Pension Service Notices for Scheme 0

Registration 0

You have 0 notices for this Pension Scheme

Registration for 05 Apr 2006 View [View](#)
Tax cert

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<https://pensionschemes.online.inlandrevenue.gov.uk/psa/PensionSchemeSu...> 03/05/2006



Audit & Pension Schemes
Services
Yorke House
PO Box 62
Castle Meadow Road
Nottingham NG2 1BG

Telephone: 0115 974 1712
Fax: 0115 974 1480

Deputy Director: Jayne Banner

Malcolm Dunn
Pensions Marketing Consultant
St James's Place
J. Rothschild House
Dollar Street
Cirencester
Gloucestershire
GL7 2AQ

Date: 02 July 2002
Our ref: SF087/205/1A
Your ref:

For information and advice,
visit our pages on the
Inland Revenue website:

www.inlandrevenue.gov.uk

Dear Mr Dunn

J ROTHSCHILD ASSURANCE PERSONAL RETIREMENT PLAN
J ROTHSCHILD ASSURANCE ADDITIONAL RETIREMENT PLAN

Thank you for your letter dated 19th June 2002 and the two amending deeds referring to the above two schemes.

I have examined the two amending deeds dated the 10th June 2002 and I can confirm that they are satisfactory. The approval status of the each scheme remains unaffected.

These amendments mean that the 'J Rothschild Personal Retirement Plan' has changed to the 'St James's Place Personal Retirement Plan' (reference SF087/205/1A) and the 'J Rothschild Assurance Additional Retirement Plan' which has now become the 'St James's Place Additional Retirement Plan' (reference SF086/099). I have noted the appropriate files accordingly.

Could I request that in scheme specific correspondence our scheme reference numbers be quoted, as this will avoid confusion in the future?

Yours sincerely


SARAH MEE

NOTE

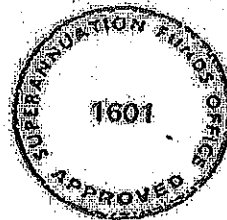
Where an amendment is made to either a scheme or any personal pension arrangements made under it, any approval granted under Chapter IV Part XIV Income and Corporation Taxes Act 1988 will cease to have effect unless the amendment (including an amendment made to satisfy the appropriate personal pensions scheme requirements) has been approved by the Board of Inland Revenue (section 631(4) Income and Corporation Taxes Act 1988).

A copy of this letter has been sent to the Inland Revenue, Claims Branch, Central Unit (PP), St John's House, Merton Road, Bootle, Merseyside, L69 9BB who will contact you regarding the recovery of basic rate tax under section 639(4) Income and Corporation Taxes Act 1988.

Yours faithfully

Alan R. S.

Mrs A M M Fowler





Inland Revenue
Superannuation Funds Office

Please reply to the Controller

P.P. Tech

Lynwood Road
Thames Ditton
Surrey KT7 0DP
GPN 3017
Fax: 081-398 4242 ext 4253
Telephone: 081-398 4242
ext 4566

J M Glendinning
Scottish Amicable
STIRLING

Your reference PENS/IMG/JM

Our reference SF87/205/1

Date 19 DEC 91

Dear Sir

Name of Scheme: J ROTHSCHILD ASSURANCE PERSONAL RETIREMENT PLAN

Name and Address of Provider: J ROTHSCHILD ASSURANCE PLC, J ROTHSCHILD HOUSE,
DOLLAR STREET, GIRENCESTER, GLOUCESTERSHIRE GL7 2AP

Name and Address of Scheme Administrator: J ROTHSCHILD ASSURANCE PLC,
J ROTHSCHILD HOUSE, DOLLAR STREET, GIRENCESTER, GLOUCESTERSHIRE GL7 2AP

With reference to your application of 6 December 1991, I am authorised by the Board of Inland Revenue to inform you that the above named scheme has been approved as a personal pension scheme for the purposes of Chapter IV Part XIV of the Income and Corporation Taxes Act 1988 with effect from 6 December 1991.

This approval is given on the understanding that:-

1. The Scheme Administrator will comply with the requirements of sections 639 and 652 Income and Corporation Taxes Act 1988 and any regulations made under Chapter IV Part XIV of that Act.
2. The scheme and any personal pension arrangements made under it will be used in the form agreed with this Office amended only to the extent to which this Office has given its agreement in advance.
3. This Office will be told immediately of any change of Administrator or his address.
4. The Scheme Administrator will, at the end of each income tax year, provide such information about scheme members as may be required by the Inland Revenue.
5. The Administrator will comply with any undertaking(s) that he has given to the Board of Inland Revenue.

50 NOV 1991
560

JS18/12