

Part A - Member Details

Section to be completed by the **SIPP Member**

Member Name	Deborah Macpherson
SIPP Reference	WMPP0487
NI Number	WL676931D
Receiving Scheme Name	Macpherson Pension Scheme
Receiving Scheme Provider Name	RC Administartion Ltd

Transfer Basis

Uncrystallised Funds:

Full Transfer	x	Partial Transfer	
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If partial:

£	or	%
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Crystallised Funds

Full Transfer	x
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Uncrystallised funds are those from which you have not yet accessed any pension benefits.

Crystallised funds are those you have drawn retirement benefits from. Partial transfers are not permissible from crystallised funds.

Basis of Transfer:

Cash Transfer	x	In-Specie Transfer	x
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Assets can be sold and transferred as a cash amount or can be left intact with a transfer of ownership to the receiving scheme (known as 'in-specie')

If 'in-specie' please provide a schedule of those assets to be transferred in this manner

Praemium Retirement Services Limited

P: +44 (0) 808 178 5125

E: advisersupport@praemium.com W: www.praemium.com

Praemium Retirement Services Limited is authorised and regulated by the Financial Conduct Authority, reference 462660. Registered in England and Wales under company No. 03121034 with a registered office address of 4th Floor, Suite 643-659, Salisbury House, London Wall, London EC2M 5QQ. Praemium Retirement Services Limited is part of the Praemium Group.

Reason for Transfer

It would helpful if you could provide below a brief description of your reasons for transferring:

PRÆMIUM SERVICES & ADMINISTRATION NOT SATISFACTORY.

Financial Advice

If you have received regulated financial advice in respect of the transfer of benefits, please complete your financial adviser's details below:

Adviser Name	
Adviser Firm	
Adviser Firm Address	
Adviser Firm Contact Number	
Firm FCA Number	

Or, I confirm I have not received financial advice in relation to this transfer (tick)

X

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Member Declaration

- I have read the **Important Information** on the front of this form.
- I can confirm that if I am transferring any investments 'in specie' that it is my responsibility to ensure that the receiving scheme will accept the transfer.
- I understand that due to the implications of pension scams the transfer of benefits may take time to complete dependent on the circumstances of the transfer.
- I confirm that I have not been offered a personal financial incentive to move my pension scheme to a new provider.
- I understand the receiving scheme may contact Praemium Retirement Services Limited in respect of my pension arrangement and give my authority for you to release information and deal direct with the receiving scheme with regards to the transfer.
- I am fully aware of the implications of the transfer and authorise Praemium Retirement Services Limited to deduct any fees and charges in relation to the transfer or any amounts due to HMRC in respect of any liabilities.
- Praemium Retirement Services Limited have not provided any advice or recommendations on this transfer of benefits.
- Praemium Retirement Services Limited will not be liable for any unauthorised payment charges that may arise within the receiving scheme in respect of any transfer of assets that were authorised whilst in the ceding scheme.
- I understand that the value of my assets may change during the transfer process and indemnify Praemium Retirement Services Limited against any fluctuations and consequential impact to the value of my benefits.

Signed		Dated	16-06-22
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Part B – Receiving Scheme Details

Section to be completed by the **receiving pension scheme**

Pension Provider	RC Administartion Ltd
Scheme Name (as per its governing documentation)	Macpherson Pension Scheme
Reference	N/A
Name of Scheme Administrator	RC Administration Ltd
Address of Scheme Administrator	1A Park Lane Poynton Cheshire SK12 1RD
Email Address	info@rcadministration.com
Contact Number	0330 311 0839
Type of Scheme	SSAS
Pension Scheme Tax Reference (PSTR)	20006099RH

For the receiving scheme, please provide dated prints from the HMRC website of both the 'Pension Scheme Summary' and 'Current Scheme Details' pages. These prints should be no more than one month old.

Additional Information Required

If the receiving scheme is an HMRC registered pension scheme for the purposes of Part 4 of the Finance Act 2004 the following additional information is required:

- A copy of the HMRC PSTR certificate
- Certificate of the HMRC registered scheme administrator

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Additional Information Required (continued)..

- Certified copy of the scheme's Trust Deed and Rules
- Confirmation of the Trading Status of the sponsoring employer
- Confirmation of the relationship of the transferring member and the sponsoring employer

Please be advised that we reserve the right to check the registered status of any receiving scheme with HMRC and this may lead to additional delays.

Cash Transfers

Where a cash transfer has been instructed the benefits should be paid to the following account:

Bank Name	Metro Bank
Bank Account Name	Macpherson Pension Scheme
Sort Code	23-05-80
Account number	45071332
Payment Reference	D Macpherson Transfer

In-Specie Transfers

Where assets are being transferred in-specie please provide details of who we should contact in respect of the re-registration of those assets:

Name	Georgina Martin
Address	RC Administration Ltd 1A Park Lane Poynton Cheshire SK12 1RD
Contact Number	0330 311 0839
Email Address	info@rcadministration.com

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Receiving Scheme Declaration

- We confirm that the above statements are true and that upon receipt and acceptance of the transfer value it will be applied to provide benefits for or in respect of the member under the receiving scheme.
- Where all or any part of the transfer value relates to Drawdown Pension (as defined in Part 4 of Finance Act 2004), we confirm that this will be applied to provide Drawdown Pension in the receiving scheme in accordance with regulation 12 of The Registered Pension Schemes (Transfer of Sums and Assets) Regulations 2006 [SI 2006/499] and any amendments thereto.
- We hereby give Praemium Retirement Services Limited permission to obtain from HMRC any information regarding the status of the receiving scheme.

Signed*	<i>Georgina Martin</i>	Dated	13/06/2022
Name	Georgina Martin	Position	Administrator

*For and on behalf of the Receiving Scheme (must be an authorised signatory)

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