Transfer out Section

Clerical Medical

Castlewood

Tickenham Road  
Clevedon

BS21 6BD

By First Class Recorded Delivery

` 04 August 2014

Dear Sirs,

**Name: Mr Jason Richard Miller**

**National Insurance Number: NR581018C  
Date of Birth: 07-Mar-1970**

**Policy Number: ppa1 / 4751437D**

Please find enclosed an application to transfer benefits to a registered pension scheme for our mutual customer.

I also enclose the following items which also meet the current industry initiative on external pension transfers to authorised registered schemes.

1. The HMRC Tax Registration letter confirming that this scheme has been registered under the new registration process and has met the declarations required for pension registration. You will note from the registration process we have undertaken “that we do not entitle either directly or indirectly to any unauthorised payments from the plan. Further, that the plan is not being administered in a way that knowingly entitles any person to unauthorised benefits”.

2. The HMRC 13 point questionnaire requesting information to satisfy Pensions Liberation concerns and our reply letter.

3. Discharge and warranty forms.

4. Trust Deed, Rules and Member Invitation letter.

These items fulfil the most current codes of practice also recommended by the Pensions Regulator and as such would you please settle this transfer payment.

The transfer payment should be made by **BACS** to the following account details:-

**Name of Bank: Metro Bank**

**Account Name: Miller SSAS**

**Account Number: 14774898**

**Sort Code: 23-05-80**

We confirm that we are a co-signatory to above account and the Trustees are unable to move any funds without our authority. This therefore protects the fund completely against any risks of pension liberation.

If you require any further documentation to be completed in order that the transfer can be concluded, please advise me accordingly.

Thank you in advance of your assistance

Yours faithfully

Michelle Lunnon

For PensionPractitioner.com

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