



With Compliments

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Company number 07796956. Registered Office: 15 Palace Street, Norwich, Norfolk, United Kingdom, NR3 1RT

Transfer agreement

Transfer of all of the cash equivalent or transfer value to an occupational pension scheme

Name of the transferring scheme: Eaton UK Retirement Benefits Plan
Name of the member: Miss R Lanzoni
Reference number: 0003743
Date of birth: 01/01/1968
Guaranteed transfer value: £43,319.57
Guarantee end date: 28/05/2014

To be filled in by the administrators of the receiving occupational pension scheme

Name of the receiving scheme:

Is the receiving scheme currently contracted-out?

Yes ☐

No ☐

If yes, please complete the box below.

Employer's contracted-out number

Scheme's contracted-out number

Date contracted-out employment began:

How any Guaranteed Minimum Pension will be revalued

If No, can the receiving scheme accept contracted-out liabilities?

Yes ☐

No ☐

Cheque to be made out to:

Address and postcode the cheque should be sent to: _____

We will transfer the payment to the receiving scheme's bank or building society account direct.

Please fill in the section below.

Bank account or building society account

Name of the account: _____

Bank: _____

Branch address and postcode: _____

Account number:

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Sort code:

		-			-		
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Roll number: _____

Guarantee

We confirm that the receiving occupational pension scheme is registered under Chapter 2 of Part 4 of the Finance Act 2004. We confirm the member is a member of the receiving scheme and the sums transferred will be held in connection with that member.

Signature for and on behalf of the administrator of the receiving scheme: _____

Print name: _____ Title: _____

Date: _____

To be filled in by the member

I confirm that I have received a statement from the receiving scheme showing the benefits to be awarded in respect of the transfer payment.

Please pay all of my cash equivalent or transfer value under the transferring scheme as a transfer value to the receiving scheme named above. I understand that:

- the payment will be instead of the benefits due, or benefits that would have been due to me or for me as a result of me being a member of the transferring scheme;
- the benefits provided by the receiving occupational pension scheme may be in a different form and of a different amount to those which would have been due under the transferring scheme;
- the Trustees will no longer have to provide benefits to me or for me as a result of me being a member of the transferring scheme;
- unless I have contracted-out benefits in the transferring scheme and the receiving scheme is contracted-out on a salary related basis, there is no statutory requirement on the receiving scheme to provide for survivor's benefits out of the transfer payment; and
- I will protect the Trustees against any costs, claims, demands or expenses which may become due as a result of the payment.

I confirm that my date of birth shown on the first page is correct.

Signature: Renata Lanzoni Date: _____

Print name: RENATA LANZONI

Eaton UK Retirement Benefits Plan

Transfer-out Trustees authority form

Name of the member: Miss R Lanzoni

Reference number: 0003743

On behalf of the Trustees/Scheme Administrator of the following arrangement, we give you permission to ask HM Revenue & Customs for any information about the Plan's registration status.

Name of Plan: _____

Address and post code: _____

Pension scheme tax reference (PSTR) /
QROPS reference number: _____

Name of Scheme Administrator: _____

Employer contracting-out number: _____

Scheme contracting-out number: _____

Signature by, or on behalf of, the Trustees/Scheme Administrator:

Print name: _____ Position: _____

Scheme Administrator ID no. (if applicable): _____

Date: _____

Please return the filled-in form to: Eaton UK Retirement Benefits Plan
PO Box 545
Redhill
RH1 1YX