

Warranty and Undertaking

To be completed by the Administrators of your new scheme

All fields must be completed

Customer name

CHARLES REID RUSSELL

Date of birth

21061946

Pension Plan number(s)

0552834200

0552834000

Scheme/plan details

New scheme number/policy number

RMS

Pension scheme Tax Reference (if applicable)

00801957RW

Is the customer taking retirement benefits immediately?

☐

Yes

☒

No

Type of scheme – please tick

A) A Personal Pension Scheme

☐

B) A Stakeholder Pension Scheme

☐

C) A Retirement Annuity Contract

☐

D) A Free Standing Additional Voluntary Contribution Scheme

☐

E) Buy Out or Section 32(A) plan

☐

F) A Money Purchase Retirement Benefit Scheme

☒

G) A Final Salary Retirement Benefit Scheme

☐

H) A Relevant Statutory Scheme

☐

I) Self-Invested Personal Pension (SIPP)

☐

J) Small Self-Administered Scheme (SSAS)

☐

ECON number (if applicable):

N/A

Payment Details

Please indicate

Payment to your account ☐ Cheque ☐

Please provide bank account details to enable the settlement to be issued directly to the nominated bank account.

Details to allow payment to the new provider from HSBC Life (UK) Limited/HSBC Trust Company (UK) Limited.

Plan number:

0552834200 AND 0552834000

Name of bank

Bank address

Sort code

Account number

Account/payee name

Declaration

I declare that the answers I have given are not misleading, and are true, accurate and complete. I have attached confirmation of the transfer request (eg, a copy of our application form).

I declare that the receiving scheme is a UK Registered Pension Scheme.

I understand that the provider of the above Pension Plan, being HSBC Life (UK) Limited/HSBC Trust Company (UK) Limited (as the case may be) is discharged from all liabilities relating to this Pension Plan on completion of the transfer.

Signed for/on behalf of
the Trustees/Scheme
Administrator of the
receiving scheme

T. Goddard

Print full name

THOMAS GODDARD

Date

15/10/2013

Position within
company:

ADMINISTRATOR

Please note that we can only proceed if this form has both an original signature and is dated correctly.

Notes

- This information has been requested in response to HM Revenue & Customs measures aimed at combating the misuse of pension transfers.
- We will be unable to complete any transfer request without the information requested on this form.
- Transfer payments will only be made payable to Life Offices or Trustees/Scheme Administrators as appropriate.
- HM Revenue & Customs rules prevent us from making transfer payments to, or via, third parties (including independent brokers or financial advisers).



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All fields must be completed

Customer name

TORILL CATHERINE RUSSELL

Date of birth

17021948

Pension Plan number(s)

BBP820F(9F0G58X000)

055221Q000 AND 055221Q200

Scheme/plan details

New scheme number/policy number

RMS

Pension scheme Tax Reference (if applicable)

00801957RW

Is the customer taking retirement benefits immediately?

☐ Yes ☒ No

Type of scheme – please tick

A) A Personal Pension Scheme

☐

B) A Stakeholder Pension Scheme

☐

C) A Retirement Annuity Contract

☐

D) A Free Standing Additional Voluntary Contribution Scheme

☐

E) Buy Out or Section 32(A) plan

☐

F) A Money Purchase Retirement Benefit Scheme

☒

G) A Final Salary Retirement Benefit Scheme

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H) A Relevant Statutory Scheme

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☐

ECON number (if applicable):

N/A

Payment Details

Please indicate

Payment to your account ☐

Cheque ☐

Please provide bank account details to enable the settlement to be issued directly to the nominated bank account.

Details to allow payment to the new provider from HSBC Life (UK) Limited/HSBC Trust Company (UK) Limited.

Plan number:

BBP820F (9F0458X000) AND 055221Q000 AND 055221Q200

Name of bank

Bank address

Sort code

Account number

Account/payee name

Declaration

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Signed for/on behalf of
the Trustees/Scheme
Administrator of the
receiving scheme

TC Goddard

Print full name

THOMAS GODDARD

Date

15/10/2013

Position within
company:

ADMINISTRATOR

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