

Date	19/01/2017	Our Ref	NW Support
<b>Brad Davis</b> <b>Pension Practitioner.com</b> <b>Daws House</b> <b>33-35 Daws Lane</b> <b>London</b> <b>NW7 4SD</b>		Tilney Financial Planning (National) Northern Assurance Buildings 9/21 Princess Street Manchester, M2 4DN FCA No: 134190 Email: <a href="mailto:nwsupport@tilney.co.uk">nwsupport@tilney.co.uk</a> Tel: 0161 832 6413 Fax: 0161 834 2230	
Department: SSAS Servicing		Your Ref	
Client Name	SPM SSAS Mary Buckley		
Plan No			
DOB		NINO	
Enclosed:		Required	
X	Lifetime Allowance Certificate	X	Acknowledgement
X	Benefit Crystallisation questionnaire	X	Confirmation of payment
X	Metro Outward Payment Instruction		
<p>Dear Brad</p> <p>Please find enclosed the above documentation for your attention as discussed with Abbie Clegg.</p> <p>Please acknowledge receipt and confirm above requirements.</p> <p>Should you have any queries, please don't hesitate to contact me.</p> <p>Yours faithfully  Claire Ellin  Financial Planning Support</p>			

Benefit Crystallisation Event  
Member Questionnaire

Scheme Name: SPM SSAS

Member Name: MARY LINDA BUCKLEY

Please accept this as my written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Event:

Required Benefits

1. I wish to draw all of my fund in Tax Free Cash and Income
2. I wish to vest segments and take as Tax Free Cash and Income
3. I wish to vest sufficient funds to provide a Tax Free Cash amount of £ BALANCE OF ALL UNCRYSTALLISED FUNDS.
4. I wish to vest sufficient funds to provide an annual Income amount of £

Other (please detail)

Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme ?

Yes  
☒ No

If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

Date: \_\_\_\_\_

What is the percentage of the SLA used up under those earlier Benefit Crystallisation Events that occurred under any other Registered Pension Scheme you are (or were) a member of, as recorded on your latest scheme statement(s). Copy statement(s) **MUST** be attached.

Name of Registered Pension Scheme  
% SLA

Signed:

M.L. Buckley

Date:

13/1/17

## Lifetime Allowance Certificate

**Scheme Name:**

**Member Name:**

Does Enhanced Protection apply:

.....

Does Primary Protection apply:

.....

Percentage of lifetime allowance remaining before this BCE:

.....

Percentage of lifetime allowance under this BCE:

.....

Percentage of lifetime allowance after this BCE:


.....

Date of BCE:

.....

Amount of BCE used:

.....

X M.C. Buckley 

Signed:

**For Scheme Administrator**

Date: 13/1/17

# Outward Payment Instruction (Faster Payments & CHAPs)



Store

## 1. Customer details

Customer Name

Account Number 

1	8	2	8	5	4	4	4
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## 2. Payment details

Payment Type

- ☒ Faster Payment (No Fee) *Faster Payment Maximum Value = £100K. Payments of a higher value must be sent via CHAPs*
- ☐ CHAPs (£17.50 Fee) *CHAPs Cut Off Time = 3PM. Payments received after this time will be processed Next Day*
- ☐ Account To Account Transfer

Amount (GBP) 

	4	8	0	1	6	7	8
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 Date To Process 

2	0	0	1	2	0	1	7
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Amount in Words

## 3. Beneficiary Information

Beneficiary Name

Beneficiary Sort Code 

4	0	3	1	0	2
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Beneficiary Account Number 

8	1	1	0	9	7	1	5
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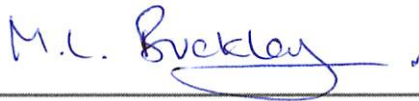
Payment Reference (if applicable)

## 4. Customer Signature

Authorised Signature

  
Date:

Authorised Signature

  
Date:

FOR INTERNAL USE ONLY - ID & V Confirmed

☐ Customer Photo ☐ Customer Signature ☐ 4Tress

☐ ID

Input By:   
Signature:   
Date: 

D	D	M	M	Y	Y	Y	Y
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Authorised By:   
Signature:   
Date: 

D	D	M	M	Y	Y	Y	Y
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