



ReAssure

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Page 1 of 5

Policy number: UP2156585

Policyholder: Mrs Susan Singleton

## Transfer Payment Release Form

(to transfer your pension fund to another pension provider)

You may have an alternative to taking, or transferring the money from your pension, why not contact us on 0800 073 1777.

### Section 1 - Information we already know

#### Part A: Your personal details

1. Policyholder:	Mrs Susan Lucy Singleton
2. Policy number:	UP2156585
3. Policyholder's/Member's national insurance no:	WK 99 01 46 D
4. Type of scheme	

#### Part B: Your type of UK registered pension scheme

Personal pension plan

#### Part C: Current value details

Total amount to be transferred.*	£61,414.43
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#### Notes:

The current value is calculated as at 1 April 2023

The current value is not guaranteed and we will re-calculate it on the day after we receive all the documents we've requested.

ReAssure Ltd, Registered Office: Windsor House, Telford Centre, Telford, Shropshire, TF3 4NB

Registered in England No. 754167

Tel: 0800 073 1777 Fax: 0808 168 3331 Website: [www.reassure.co.uk](http://www.reassure.co.uk)

ReAssure Ltd is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Firm reference number 110495. Member of the Association of British Insurers.

Please return all pages of this form  
Page 2 of 5  
Policy number: UP2156585  
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#### Part D – Advice and Guidance

Choosing what to do with your pension pot is an important financial decision. We recommend you use the government's free, impartial guidance service, called **Pension Wise** from **MoneyHelper**, or get personalised financial advice, before making any decision about which option is most suitable for your personal circumstances. You can make an appointment with one of **Pension Wise**'s specialists at [moneyhelper.org.uk/pensionwise](http://moneyhelper.org.uk/pensionwise), by calling them direct on **0800 100 166** or we can book an appointment for you.

Have you spoken with Pension Wise about taking this option?



Yes, on

11

04

23



No, I didn't want guidance from Pension Wise



No, I've spoken to a regulated financial adviser instead



No, I didn't have enough time



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Mailing

0000243



Please return all pages of this form

Page 3 of 5

Policy number: UP2156585

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## Section 2 - Confirmation from you the policyholder

### Declaration made by you

If you were given a policy document when you took out this pension you'll need to return this with this form. If you cannot find them then, please read the section below.

I have carried out a diligent search in all the places I would expect to find the policies. I have also made enquiries of all people who may be able to give me information about their whereabouts but I have had no success in locating the policies.

If I find out where the policies are, I will inform you immediately. I will also return the documents to you as soon as I find them.

I authorise payment of the current value to the receiving scheme, details of which the receiving scheme administrator has completed in Section 3, Part A. On payment of the transfer I discharge ReAssure Limited from any and all liability under the policies numbered in Section 1, Part A.

Signature of Policyholder  
/Trustee:

Date: 3/8/23

Print Name:

SUSAN LUCY SINGLETON

Where the member is NOT the policyholder, please sign below:

Signature of member:

Date:

Print Name:



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Please return all pages of this form

Page 3 of 4

Policy number: UP2156585

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**Section 3 - For use by the new scheme administrator only****Part A: New scheme details**

1. Name of Pension Provider:	RC Administration Limited
2. Name of Scheme:	Singleton Family SSAS
3. Address of Scheme:	1A Park Lane, Poynton, Cheshire
Postcode:	SK12 1RD
Company Telephone Number:	0330 311 0839
4. Reference, to be quoted in correspondence:	Singleton Family SSAS
5. Pension Schemes Tax Reference (PSTR) Or, pre-2006 SF reference if no PSTR available	00836467RJ

**Part B: Confirmation of payment details to a UK registered non-Occupational Pension Scheme; otherwise complete Part C.**

Bank name: (e.g. HSBC)	Metro Bank									
Address:	One Southampton Row, London									
Postcode:	WC1B 5HA.									
Bank sort code:	2	3	-	0	5	-	8	0		
Bank account number:	4	5	7	3	0	7	1	9		
Building society account number:										
Account holder's name:										
Share account number:										
Payment reference: (must be quoted):	PTI- SLS									

**Part C: Confirmation of payment details to an Occupational Pension Scheme; otherwise complete Part B**

Cheque payee:	
Address:	
Postcode:	
Payment reference: (Must be quoted)	

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Please return all pages of this form  
Page 4 of 4  
Policy number: UP2156585  
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**Section 3 - For use by the new scheme administrator only (continued)**

**Part D: Complete if the transfer payment is to be sent via an Independent Broker**

The Broker is employed as a third party administrator of the receiving scheme and administers the scheme's bank account	<input type="checkbox"/>
The receiving scheme is a Self-Invested Personal Pension (SIPP) and the Broker is employed as a third party administrator of the SIPP and administers the SIPP's bank account	<input type="checkbox"/>

**Part E: Complete if the transfer payment is to be made payable to an Independent Broker**


The Broker is the appointed Scheme Administrator of the SIPP (Self-Invested Personal Pension)	<input type="checkbox"/>
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**Part F: Declaration by receiving scheme administrator**

I/We declare that:

- the receiving scheme is a registered pension scheme governed and administered under UK Pension Law.
- the receiving scheme is as specified in Section 3, Part B and that it is willing and able to receive the current value shown in Section 1, Part C (remembering that this value will be recalculated in line with the policy conditions)
- the transfer payment will be applied to provide benefits under the receiving scheme in accordance with the applicable requirements of the Pensions Schemes Act 1993 and Finance Act 2004 amended as appropriate.
- all information given in this section is true and complete.

**Part G: Signatures of receiving scheme administrator/scheme trustee**

Signature 	Print name: Lisa Welton
Date: 04 August 2023	Position: Administrator
For and on behalf of	RC Administration Limited

(Trustees/Administrator of receiving scheme)