



ReAssure

Mailing 0000013

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Policy number: U167557

Transfer Payment Release Form (to transfer your pension fund to another provider)

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

This form is important as it helps us to transfer your pension fund to the new Pension Provider correctly with the minimum of delay.

Section 1 - Information we already know

Part A: Your personal details

1	Policy number:	U167557
2	Policyholder name:	Mrs Susan Lucy Singleton
3	National Insurance number:	WK 99 01 46 D
4	Telephone number: (Important to resolve any queries)	07885 700223

Part B: Your type of UK registered pension scheme or contract

Section 32 Transfer Buy-Out Plan

Part C: Normal Minimum Pension Age (NMPA)

On 06 April 2028, the Government is increasing the Normal Minimum Pension Age (NMPA) from 55 to 57. This means that from 06 April 2028, you will have to wait until you reach age 57 to take money from your pension.

We recommend you get independent professional advice from a Financial Adviser if you're unsure what to do. A Financial Adviser can make a personal recommendation based on your individual circumstances and the options available to you. If you don't have an adviser **www.moneyhelper.org.uk** can provide you with impartial guidance, useful tools and calculators or help you find a financial adviser.

Part D: Current value details

Current value	£28,367.11
The current transfer value, which can be taken from age 55 is	£0
The current transfer value, which can be taken in line with the NMPA is	£28,367.11

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

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Section 1 - Information we already know (continued)

Notes:

The current value is calculated as at 18 June 2023. The current value amount is not guaranteed and we will re-calculate it on the day after we receive this correctly completed form from you.

Section 2 - Confirmation from the policyholder (and the member)


Part A: Declaration by the policyholder or trustee

Please return your original policy documents with this form. If you cannot find them, then please read the section below.

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

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

I/We 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/we discharge ReAssure from any and all liability under the policies numbered in Section 1, Part A.

Signature of policyholder/trustee:		Date: 31/7/23
Print name:	SUSAN LUCY SINGLETON	
Position:	POLICY HOLDER	

Signature of policyholder/trustee:		Date:
Print name:		
Position:		

Signature of policyholder/trustee:		Date:
Print name:		
Position:		



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Section 2 - Confirmation from the policyholder (and the member) (continued)

Signature of policyholder/trustee:		Date:
Print name:		
Position:		

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

Part B: Declaration by the member

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 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 10 - 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

Signature of member:		Date: 31/7/23
Print name:	SUSAN WCY SINGLETON	

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Policy number: U167557

Section 3 - For use by the new scheme administrator only

Part A: New scheme details

Name of pension provider:	RC Administration Limited
Name scheme:	Singleton Family SSAS
Address of scheme:	1A Park Lane Poynton Cheshire
Postcode:	SK12 1RD
Company telephone number:	0330 311 0839
Reference to be quoted in correspondence:	Single Family SSAS
Pension Schemes Tax Reference (PSTR) Or, pre-2006 SF reference if no PSTR available	00836467RJ

Part B: BACS payment details (where available; otherwise complete Part C)

Please make payment to the following:									
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 to be quoted:	PTI - SLS								

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Section 3 - For use by the new scheme administrator only(continued)

Part C: Cheque payment details (required for payments to the trustees of an Occupational Pension Scheme; otherwise complete Part B)

Please make payment to the following:

Cheque payee:

Address:

Postcode:

Payment reference to be quoted:

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

☐

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

☐

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)

☐

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 A and that it is willing and able to receive the transfer payment 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.

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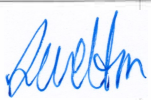
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Section 3 - For use by the new scheme administrator only(continued)

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

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