Tom Perry
Friends Life
Po Box 1810
Bristol
BS99 5SN

**By First Class Recorded Delivery**

12 June 2014

Dear Tom,

**Name: Mr Richard Paul Sollis
National Insurance Number: WE302357A
Date of Birth: 18 December 1958
Policy Number: 4004234828**

Please find enclosed your receiving scheme information requirements and declaration form to transfer benefits to a registered pension scheme for our mutual customer.

I also enclose the following items which you have requested on your form.

1. The Tax Registration letter confirming that this scheme has been registered under the new registration process and has met the declarations required for pension registration. You will note from the registration process we have undertaken “*that we do not entitle either directly or indirectly to any unauthorised payments from the plan. Further, that the plan is not being administered in a way that knowingly entitles any person to unauthorised benefits”*.
2. The Schemes Trust Deed and Rules.
3. All documentation supplied to the member.

I confirm that the Receiving Scheme is willing and able to accept the transfer and all elements of GMP and Protected Rights if contained within the transfer.

The transfer payment should be made by **BACS** to the following account details:-

**Name of Bank:  Church House Trust
Account Name: Sollis Property Finance Consultants Pension Scheme
Account Number: 33130355
Sort Code: 60-95-31
Roll / Ref Number: 3301-30355-8**

We confirm that we are a co-signatory to above account and the Trustees are unable to move any funds without our authority. This therefore protects the fund completely against any risks of pension liberation.

Please note that this scheme and has been tax registered on 21 May 2014 and that the application for submission for the tax registration was applied for post 21 October 2013.

The registration has therefore been confirmed by HMRC under their new pensions liberation check basis and HMRC have already carried out all of their required checks under their new registration system.

It will therefore not be necessary for the ceding scheme to reconfirm the current status of the scheme with HMRC before completing the transfer.

If you require any further documentation to be completed in order that the transfer can be concluded, please advise me accordingly.

Thank you in advance of your assistance

Yours sincerely,

Michelle Lunnon
**For PensionPractitioner.com**

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