



Call us at local rates on
0845 640 2000
8am to 6pm - Mon to Fri
Calls may be monitored or
recorded for quality and
security purposes.

Membership number: 50658287
Member's name: Mr Christopher Palmer
Member's date of birth: 1 July 1968
Prudential Reference: CAP/N NAYAK
Transfer value amount: £90,328.21
Date of Quotation: 6 June 2012



PRUDENTIAL PERSONAL PENSION SCHEME

DECLARATION BY PENSION PROVIDER

TITLE OF RECEIVING SCHEME

AGREEMENT OF RECEIVING SCHEME

We hereby declare that the above named has applied to transfer the value of his benefits under the scheme named above (which is a UK Registered Pension Scheme) to this Receiving Scheme.

We agree that the transfer payment from the quoted Prudential Personal Pension Scheme will be applied to the Receiving Scheme.

The receiving scheme is:

- ☐ i) A UK Registered Pension Scheme - a scheme which is registered under Chapter 2 of Part 4 of the Finance Act 2004. (This will include personal and stakeholder pension schemes, occupational pension schemes and Section 32 Buy Out contracts.)

The Pension Scheme Tax Reference (PSTR) is

- ☐ ii) A Qualifying Registered Overseas Pension Scheme - a scheme established and regulated and recognised as a pension scheme in one of the following:

- a member state of the European Economic Area (EEA)
- a country which has a double taxation agreement with the UK that contains exchange of information and non discrimination provisions
- any other country, if the scheme complies with specific conditions relating to member access and payment of benefits.

The scheme must also undertake to notify Her Majesty's Revenue and Customs if the scheme ceases to satisfy the above conditions and to supply certain payment information.

- ☐ We enclose a copy of the acceptance letter from HMRC Audit and Pensions Scheme Services confirming the receiving scheme is a Qualifying Registered Overseas Pension Scheme (please tick this box to confirm the letter is enclosed).

- ☐ Please tick this box if the value of these benefits are being used to purchase a pension for immediate vesting.

Please note: If you are to pay the tax free cash sum to the policyholder please ensure all parts of this quotation are completed. If we are to pay the tax free cash sum, you will need to contact us for an Open Market Option quotation.

PRUDENTIAL PERSONAL PENSION SCHEME
DECLARATION BY PENSION PROVIDER

PAYMENT DETAILS

We will credit the transfer value direct to your bank and to enable us to do this, please complete the following:

BANK DETAILS

Name of the bank	<div></div>
Address	<div></div>
	<div></div>
	<div></div>
Sort Code	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
Name of account holder	<div></div>
Account number	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>

If you do not wish us to make payment direct, we will send you a cheque. Cheque to be made payable to:

SIGNATURE

Authorised signature of pension provider

Date

X

D	D	M	M	Y	Y	Y	Y
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Status of signatory

Please also add your Pension Provider/Company Stamp to this document. Failure to do so may delay payment.