

Personal Investing

21/2/23

Retirement Capital

1A Park Lane
Poynton
Stockport
SK12 1RD

Dear Sir / Madam,

Personal Pension Transfer Out Request

Your Account Number 2002697RT

Our reference: S100046566

We have recently been instructed by our mutual client to arrange the full transfer out from your pension scheme. Please find attached the customer authority for this request.

This transfer will be into WorkSave Pension Plan, Pension Scheme Tax Reference - 00714474RE held with Legal & General (PMS) limited.

Please note that we can't accept the following benefit types:

- Overseas pension schemes
- Defined benefit pension schemes
- Pension credit from a divorce
- Pension that has already been crystallised in drawdown
- Pensions that include any element of With Profits investments, guaranteed minimum pension or guaranteed Annuity rates.
- Partial values – we can only transfer the full amount

If your scheme matches one of the criteria above or can be transferred via Origo, please call us on 0345 678 0020. Lines are open Monday to Friday, 9am to 5pm. We may record and monitor calls.

If you require documentation to be completed by us please contact us on customercare@landg.com quoting the reference provided above and confirm the PS21/21 nudge response from the customer.

Yours sincerely,

Chloe Newman

Customer and Client Advisor

Transfer request form

Personal Pension

Once you've completed this form, please return it to:

Legal & General Retirement
PO Box 809
Cardiff
CF24 0YL



We'll then contact your existing provider and begin the transfer process.
Your current provider may also ask you to complete some forms.

1 Your personal details



Please complete this section in full.

1. What is your full name and title?	Mr/Mrs/Miss/Ms/ Other	MS
	Surname	KALNARS
	First name(s)	VERONICA KALNARS
2. What is your date of birth?		16 04 1963
3. What is your current permanent residential address including postcode and telephone number?	Address	20 FALCON CLOSE SHOREHAM BY SEA BN43 5HN
	Postcode	BN 4 3 5 H N
	Home phone	
	Mobile phone	07733 021161
	Email address	vkalnars@yahoo.co.uk
4. What is your National Insurance number?		NA 663132A
	You must have a permanent National Insurance number.	For example, AB 123456 C

THE CONTENTS OF THIS FILE
HAVE BEEN CLASSIFIED AS:

20 FEB 2023

HIGHLY CONFIDENTIAL

Legal & General

20 FEB 2023

Retirements

2 About your pension pot

Please give details of the pension pot you'd like to transfer into drawdown. We can only accept Defined Contribution pensions (also known as Money Purchase) with a value of at least £1,000.

Who is the current pension provider?

What is the existing plan number?

What is the estimated value?

Pension provider email address

Pension provider address

RETIREMENT CAPITAL

20002697RT

£ 28,276.19

emily@retirement-capital

1a PARK LANE

POYNTON

STOCKPORT

SK12 1RD

3 Declaration



Please remember that it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

To my current provider(s)

I would like to transfer my pension listed in Part 2 of this application.

I authorise Legal & General, my current provider and any financial adviser/intermediary named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of funds to Legal & General.

I accept that in order to comply with regulatory obligations, Legal & General and my current provider(s) named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.

I authorise and instruct you to transfer the funds from the plan/arrangements(s) as listed in Part 2 of this application directly to Legal & General, and to provide any instruction and/or discharge required by any relevant third party to do so.

Until this transfer is accepted and complete, Legal & General's responsibility is limited to the return of the total payment(s) to my current provider(s).

When payment is made to Legal & General as instructed, this means I shall no longer be entitled to receive pension benefits from the whole of the plan(s) listed in Part 2 of this application where the whole of the plan(s) is transferring, or that part of the plan(s) represented by the payment(s) if only part of the plan(s) is transferring.

Where you have asked me to give you the original policy document(s) in return for the transfer of pension pot(s) and I am unable to do so, I promise that I will be responsible for any losses and/or expenses which are the result, and which a reasonable person would consider to be the probable result, of any untrue, misleading or inaccurate information deliberately or carelessly given by me, or on my behalf, either in this form or with respect to benefits from the plan.

To my current provider(s) and Legal & General

I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Legal & General and my current provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application.

I authorise and instruct you to transfer funds from the plan(s) as listed in Part 2 directly to Legal & General, and to provide any instruction and/or discharge required by any relevant third party to do so:

- 1 Sell your Pension assets as detailed (not being less than £100) and/or
- 2 Transfer the cash realised to the new Pension manager, which will be: Legal & General (Portfolio Management Services) Limited, One Coleman Street, London, EC2R 5AA. Ref: PSTR 00714474RE.
- 3 To provide Legal & General (Portfolio Management Services) Limited with the information, written or non-written, concerning the Pension and to accept any instructions from them relating to the Pension being transferred.

SIGNATURES

Please sign, date and return to us at the the address on the front page.

To be completed in all cases

Applicant

I agree to the terms set out in the 'Declaration' and the use of my information as described in the privacy policy.

Signature

Date

17022023