

**Transfer Summary**

Client: Patrick Stevens  
Receiving Provider: Cranfords  
Receiving Product Type: SSAS  
Receiving Contract Reference: Winterthur Pension Scheme  
Ceding Contract Reference: C040A19  
Ceding Product Type: -  
Transaction Type: P2P  
Transfer Creation Date: 19/09/2017  
Transfer Status: Unallocated

**Transfer Status**

Status: Unallocated

**Transfer Timeframe**

Activation Date: 19/09/2017 16:03:09  
Scheduled Completion Date: 01/10/2017  
Expected Completion Date: 01/10/2017  
Transfer Alert?: -

**Notes**

Case Notes: -  
Transfer Notes:

**Product Notes**

Receiving Provider Product Note: -  
Ceding Provider Product Note: -

**Receiving Provider Contact Details**

Contact: Merle Oper  
Email Address: transfers@cranfords.biz  
Telephone Number: 0844 410 0037  
Additional Information: 48 Chorley New Road Bolton BL1 4AP

**Ceding Provider Contact Details**

Contact: -  
Email Address: -  
Telephone Number: -  
Additional Information: -

**Receiving Contract Details**

Type Of Transfer: Product Based  
Receiving Provider Reference: Winterthur Pension Scheme  
Completed Application Received Date: 15/09/2017  
Scheme Tax Reference Number: 00835666RG  
Bank Account: Winterthur Pension Scheme  
Adviser Involved?: No

**Ceding Contract Details**

Transaction Type: P2P  
Provider: Fidelity International  
Ceding Contract Reference: C040A19  
Retirement Date: -  
Pre-Retirement Benefits?: Yes  
Pre-Retirement - Transfer All Funds?: Yes  
Pre-Retirement - Approximate Value: 6,209.48  
Drawdown to Drawdown Transfer?: No  
Product Type: -

**Client Details**

Forename: Patrick  
Surname: Stevens  
Date of Birth: 03/02/1975  
National Insurance Number: SJ625249B

Receiving Provider Age Evidence Seen: Yes

Postal Code: AL5 3AF

Country: UNITED KINGDOM

Ceding Provider Age Evidence Seen: No

#### Payment

Date Funds Sent: -

Payment Method: -

Payment Reference: Winterthur Pension Scheme

Part of Larger Payment?: -

Total Transfer Amount: 0.00

#### BACS/TT Payment Details

Account Name: Winterthur Pension Scheme

Account Number: 24536645

Sort Code: 230580

Roll Number: -

Additional Information: Special account to enable client bank accounts.

#### This is an individual client bank account

#### Cheque Payment Details

Payee: CHEQUE

Address Line 1: 48 Chorley New Road

Address Line 2: Bolton

Address Line 3: Lancashire

Address Line 4: -

Post Code: BL1 4AP

