

Your customer number: JN618217B
Our ref: 11187368/Tppti03/HZM
Phone: 0300 2000 555
Email: admintransfers@bandce.co.uk

20 November 2020

Pension Practitioner
Venture Wales
Merthyr Tydfil Industrial Park, Pentrebach
MERTHYR TYDFIL
Mid Glamorgan
CF48 4DR

Dear Sir/Madam

**Transferring pension savings from The Baldry Pension Trust (Pension Practitioner)
in to The People's Pension
Mr Stuart Baldry NI No: JN618217B**

The above member has confirmed they would like us to look into the possibility of transferring the value of their benefits held in your scheme, in to their account with The People's Pension. Enclosed is a copy of Mr Baldry's signed 'Authorisation and request to transfer' form.

To enable us to proceed with the transfer please provide the following:

- Scheme information.
- Fund value.

If you need a client discharge form to be completed before a transfer can proceed, please also send this to us with the above information.

Please **do not** send a payment until you have provided the above information, as we may not be in a position to accept the monies.

Thank you in advance for your help. During this current time, I advise that if you have any questions you email us at admintransfers@bandce.co.uk quoting our reference number which can be found at the top of this letter.

Yours faithfully

Hiren Mehta
Member Services Administration

**Pension Practitioner**

Office 12
Venture Wales Building
Pentrebach Merthyr Tydfil CF48 4DR
United Kingdom

INVOICE**Bill To****The Baldry Pension Trust**

33 Greenbank Terrace
Ringstead
Kettering
NN14 4DD

Invoice#	INV-8391
Invoice Date	09 Oct 2020
Terms	Net 14
Due Date	23 Oct 2020

Item & Description	Qty	Amount
Wind Up Preparation of the Deeds for the wind up of the SSAS and the completion of all requirements and Event Reports to HMRC and the Pensions Regulator and Transfer of assets.	1	825.00
Thank you for using our services.	Sub Total	825.00
	Total	£825.00
	Balance Due	£825.00

Terms & Conditions

Payment to be made on receipt of invoice

BACS:

Barclays Bank Plc

Account Name: The Practitioners Partnership

Sort Code: 20-45-45

Account Number: 23784606

Pension Practitioner is a trade style of The Practitioners Partnership LP

UK Address: Office 12, Venture Wales Building, Pentrebach, Merthyr Tydfil CF48 4DR, United Kingdom

Registered Address: 1st Floor, World Trade Centre, Gibraltar. GX11 1AA

Registered in Gibraltar at Companies House No: 159

91236/0315

**Authorisation and Request to Transfer Pension
Benefits into The People's Pension**

Please read the notes 'Important information about transferring pensions' before completing.
Please complete all blank boxes using block capitals.

Your Own Details

Title (Mr/Mrs/Miss/Ms) Mr Surname Baldry

Forenames (in full) Stuart

Address 33 Greenbank Terrace, Ringstead, KETTERING, Northamptonshire
Postcode NN14 4DD

Email Address stuartbaldry@hotmail.com

Telephone numbers:

Day 07967 773190 Evening Mobile

Sex (Male/Female) Male Date of Birth 25/03/1979

RECEIVED
- 6 NOV 2020

Transferring Scheme Contact Name & Address.

This is the name & address of the company actually paying the transfer value over to The People's Pension.

(NOTE: If you have more than one Transferring Scheme please contact us for a further form.)

Company or Scheme Name THE BALDRY TRUST

Your policy no/s

Address 33 GREENBANK TERRACE RINGSTEAD

Postcode NN14 4DD

Telephone number 01969 773190

Contact Name
(if known)

Transfer value £
(if known)

PTO
→

912366/0315

Your Declaration

I authorise and instruct you to transfer funds from the plan(s) as listed in the Transferring Scheme section of this application directly to The People's Pension. Where you have asked me to give you any original policy document(s) in return for the transfer of funds 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(s).

I authorise you to release all necessary information to The People's Pension to enable the transfer of funds to The People's Pension.

Where applicable, I authorise you to obtain from, and release to, the financial adviser named in this application any additional information that may be required to enable the transfer of funds.

If an employer is paying contributions to any of the plans as listed in the Transferring Scheme section of this application, I authorise you to release to that employer any relevant information in connection with the transfer of funds from the relevant plan(s).

Until this application is accepted and complete, The People's Pension's responsibility is limited to the return of the total payment(s) to the Transferring Scheme.

Where the payment(s) made to The People's Pension represent(s) all of the funds under the plan(s) listed in the Transferring Scheme section of this application, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from the plan(s) listed.

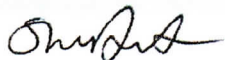
Where the payment(s) made to The People's Pension represent(s) part of the funds under the plan(s) listed in the Transferring Scheme section of this application, then payment made as requested will mean that I shall no longer be entitled to receive pension or other benefits from that part of the plan(s) represented by the payment(s).

I promise to accept responsibility in respect of any claims, losses and expenses that The People's Pension and the Transferring Scheme may incur as a result of any incorrect information provided by me in this application or of any failure on my part to comply with any aspect of this application.

I have read and understood the notes 'Important Information about Transferring Pensions'. I have not asked for advice nor received advice from any representative of The People's Pension Trustee Limited or its agents.

Please sign and date below:

Signed



Dated

2/11/20

Important: Transferred funds will be paid into your chosen fund. If you have not chosen a fund the value will be paid into The People's Pension Balanced Investment Profile which is the default investment profile.

The People's Pension Scheme is an occupational pension arrangement, governed by The People's Pension Trustee Limited and administered by B&CE Financial Services Limited. The scheme is approved by HM Revenue and Customs (HMRC) as a Registered Pension Scheme under Chapter 2 Part 4 of the Finance Act 2004 (PSTR number 00785199RQ).