

Data Processing Centre  
Retirement.Capital  
Venture Wales Building  
Merthyr Tydfil Industrial Business Park  
Merthyr Tydfil  
Wales  
CF48 4DR

20/07/2020

Dear Esther,

Mansfield-Corbett Retirement Benefit Fund

Further to our conversation the other day, please find enclosed the required discharge form for my holding with Aviva.

I have signed the required section, and hopefully it should be a relatively straight forward matter from now on. I am away on holiday from the 23<sup>rd</sup> July to the 6<sup>th</sup> August, but I will be available on 07879468195 should you have any queries.

Kind regards,

Mike

Michael Mansfield-Corbett

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## Quotation of Transfer Value Benefit

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### Quotation of transfer value for transfer on 16/07/2020

Pension Plan: **1399315** – Mr. Michael Mansfield-Corbett

This quotation was produced on 15/07/2020

This quotation assumes your date of birth is 16/09/1965

Total Transfer Value:

**£ 10,393.36**

### Notes

Please note that where you qualify for a protected retirement age or where you have protected tax-free cash this may be lost on transfer. If you have applied to HM Revenue & Customs for Enhanced or Fixed Protection, this may be lost if the transfer is not a permitted transfer. Please seek financial advice.

All values shown in this quotation are based on the latest information available to Aviva. The actual transfer value will include all contributions received before the date of transfer.

The values in this quotation are not guaranteed. The actual transfer value paid will normally be calculated on the day the final documents required for payment are received by Aviva (please see policy provisions for further details). Remember that unit values can go down as well as up so the final amount may be less than the amount currently being quoted.

## Instructions and Documentation Required

If you wish to transfer your pension benefits to another provider, please complete the enclosed Declaration of Claim Discharge form and return it to us at the following address:

Aviva Service Centre  
PO Box 12498  
Parkside Terrace  
Edinburgh  
EH16 5ZR



## Declaration of Claim Discharge

Pension Plan: 1399315 – Mr. Michael Mansfield-Corbett

### A. Transfer Instructions

Complete this section in all cases.

I elect to take the benefits as detailed on quotation dated 15/07/2020

If you choose to transfer to another approved pension provider please complete Section F overleaf and ask the Trustees/Administrators of the receiving Scheme/Life Office to complete Section C below.

### B. Transfer Value Details

Total amount of transfer value

£10,393.36

The total amount of transfer value is not guaranteed. The actual transfer value paid will be calculated on the day after the final documents required for payments are received by Aviva (please see policy provisions for further details). Remember that unit values can go down as well as up, so the final amount may be less than the amount quoted above.

### C. Receiving Scheme/Life Office Details

Notes : a) for values over £150,000 a cheque will be drawn in favour of the receiving scheme/life office  
b) if you would rather receive payment by cheque, please complete your company name and address in the fields below

To be completed by the Trustees/Administrators of the Receiving Scheme/Life Office.

Name of Receiving Scheme/Life Office.....  
(The cheque will be made payable to this name)

Address : .....

..... Post Code .....

A/c Name.....A/c Number.....Sort Code.....

Reference to be Quoted.....  
(if blank policy number will be quoted)

The transfer value will be paid to:

A registered pension scheme as defined by Part 4 of the Finance Act 2004

☐

Please Tick

If the transfer is going to a retirement benefits scheme or a statutory scheme, please state the normal retirement age for the scheme.

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*Continued/*

We agree to accept the transfer as indicated above.

Signed ..... Date .....

Title/Designation .....

(for the Trustees/Administrators of the Receiving Scheme/Life Office)

#### D. Notes

- You may lose any protected tax free cash on transfer.
- If the scheme has applied to HMRC for a protected retirement age, this may be lost on transfer.
- If you have applied to HMRC for Enhanced or Fixed Protection this may be lost on transfer.
- If you have applied to HMRC for a protected retirement age, this may be lost on transfer.

Should you have any queries relating to the above please seek financial advice.

#### E. Documentation

(For Occupational Pensions only)

The following documents are required to calculate the Maximum Tax-Free Cash Sum (where applicable); the following details will be required:

- Final remuneration at 5<sup>th</sup> April 2006 or the date of leaving service if earlier
- Date of entry to company service, and where appropriate, the date of leaving.
- Full details of any concurrent benefits at 5<sup>th</sup> April 2006 or date of leaving service if earlier.
- If the Member's P60 earnings exceeded £50,000 in the tax year 2004/2005, full details of any retained benefits at 5<sup>th</sup> April 2006, or date of leaving service, if earlier  
(please note that retained benefits may not be required in all circumstances. Please speak to your financial adviser).

#### F. Signature

**Complete this section in all cases.**

I authorise the transfer to the Scheme/Life Office as detailed overleaf.

This authority will act as my discharge to you in respect of all sums due to me under the plan as soon as the cheque is paid to the receiving Scheme/Life Office.

Signed M. Mansfield-Gibb Date 20/7/20  
(Policyholder's signature)

Telephone number 07879468195

**Please return the completed form to:**

**Aviva Service Centre, PO Box 12498, Parkside Terrace, Edinburgh, EH16 5ZR**