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www.investcentre.co.uk

Strictly Private & Confidential
Pension Practitioner SSAS (SHE MARITIME)
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

10 August 2020

Dear Sir or Madam

AJ Bell Investcentre SIPP - James Darren Hall - SCC909611 Your Reference: A10064001 Ascentric GIA

Mr Hall has requested that the cash and assets held within the existing pension plan held with you are transferred to the SIPP administered by us, AJ Bell Management Limited. Please find enclosed our Transfer Form, completed and signed accordingly.

Please note, the transfer is to comprise of an in specie transfer of the enclosed list of assets.

If applicable, please forward copies of the following items to the existing custodian(s):

- a copy of the enclosed Transfer Form;
- a copy of this letter; and
- a schedule of the assets to be re-registered.

Please liaise with our Platform Support team via email at platform.support@ajbell.co.uk or by telephone on 0345 543 2452 to coordinate the transfer of the assets. They will provide the necessary re-registration details. Please quote **SCC909611** on all correspondence with them.

Any cash should be transferred by electronic payment to the following bank details:

Bank:

Bank of Scotland, New Uberior House, 11 Earl Grey Street, Edinburgh EH3 9BN

Sort Code:

12-27-34

Account Number: 06980213
Account Name: Sippdeal

Sippdeal Trustees Ltd Payments In

Reference:

SCC909611

Referring to the mechanics of the transfer, all of the assets should be transferred on the same business day and it is important that you advise us of the timing of the transfer.

Upon completion of the transfer, please provide the full transfer information, including a valuation of assets at the date of the transfer. Please ensure the total transfer value includes the assets and any cash that has been transferred. The information you provide should confirm the following:

- The transferring scheme's HMRC Pension Scheme Tax Reference number.
- The total transfer value (including the split between cash and assets).
- Whether the transfer contains any crystallised benefits, along with the relevant details.
- Details of any transitional protection relating to the transferring benefits and/or member.
- Whether the transfer is part of a block transfer.
- Whether the transfer value derives from a Pension Sharing Order or Provision.
- Details of any Earmarking Orders in force against the transferring benefits.





SIPP and Retirement Investment Account

In specie transfer form

Platform Suppe

This form is your authority to transfer funds held as investments from another registered pension scheme into an AJ Bell Investcentre SIPP or Retirement Investment Account. If you would like to transfer funds in the form of a cash-only payment, please use the SIPP or Retirement Investment Account cash transfer form. Both forms may also be used for a Junior SIPP. All transfer forms are supplementary to your application form.

Please complete and return this form to AJ Bell Investcentre, 4 Exchange Quay, Salford Quays, Manchester M5 3EE

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 83 99 060 or by email at enquiry@investcentre.co.uk.

To be completed by the transferring client	
Personal information	
Full name of adviser STEVEN HUTCHINSON	
Name of adviser firm CITRUS WEALTH MANAGE!	VT
Full name of client () MR DARREN HALL	
Date of birth	Your account reference (if known)
24/05/1965	SCC
National Insurance number	
NE927145C	
Permanent residential address	
I HORING DRIVE, HEYBRIG	on
MALDON, LOSOX	
Postcode	Country
1 osteode	NX .

Transferring scheme details
Full name of transferring pension scheme (if known) PENSION PRACTIONER SSPJ (SHE MARRITIME) Policy number ASCENTIC ATB RAME Pension Scheme Tax Reference (PSTR) A10064001 VIRI1223320012335
Name and address of administrator of transferring scheme PENSION PRACTIONER, OFFICE 12, VENTURE WARTS
BUILDING PENTREBACH, MERTHYR TYDFIL
Postcode CF48 40R
Telephone number of transferring scheme Approximate fund value to be paid to the receiving scheme £ 120, 806.
Contact name/department (if known) EMILLI MCAUSTER
This is a full transfer. This is a partial transfer. If partial, please enter the total fund value
Drawdown details Please tick one of the following three entions in respect of the funds being transferred. The funds are:
Please tick one of the following three options in respect of the funds being transferred. The funds are: 1. Not in drawdown 2. Already entirely in drawdown 3. Already partially in drawdown
Please confirm the approximate split as follows: Crystallised £ Uncrystallised £

If the transfer is in drawdown (i.e. you are transferring from a pension from which you have taken a tax-free lump sum, with the remaining funds left invested to take an income from as you choose), you must also complete our SIPP or Retirement Investment Account transfer in drawdown benefit form. For funds that are partially in drawdown, note that 'crystallised' above describes the portion of your pension that you have designated as in drawdown, after taking a 25% tax-free lump sum, while 'uncrystallised' refers to the portion of your pension you have not yet accessed in any way.



Pension Scheme Tax Reference (PSTR)

250006:00000093:001

AJ Bell Management Limited 4 Exchange Quay Salford Quays Manchester M5 3EE Audit & Pension Schemes Services Yorke House Castle Meadow Road Nottingham NG2 1BG

Tel 0115 974 1600 Monday to Friday 09:00 - 17:00

Fax 0115 974 1480

Date of issue 25/April/2007

Pension Scheme Tax Reference (PSTR)

The Pension Scheme Tax Reference (PSTR) for THE SIPP DEAL E SIPP

is 00605674RHYou should use this when you want to view the scheme details online and in all future communications with HM Revenue & Customs.

Registration (2)

Reporting

Registration for

05 Apr 2006 View

Please select the type of report below:

Tax

Relief at source

04 Feb 2008 <u>ViewAmend</u> > <u>Accounting for Tax</u>

> Registered Pension Scheme Return

> Event Report

Scheme Administration

Pension Service Notices for Scheme 🚱

Please select an option below:

You have 59 notices for this Pension

Scheme

> Scheme Administrator management > View notices

> Practitioner management

> View submission receipts

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28/2020

(di) HM Revenue & Customs

- Home
- Contact us
- Help
- Sign out

User Name: (A0051780) PSTR 00605674RH

Pension Schemes

Your HMRC Services

- Pension Schemes
 - >Welcome
 - >View messages
 - >View all Pension Schemes
 - >Advanced Scheme Search
 - >Registered Pension Schemes Manual
- Registration
 - >View Certificate
 - > View Registration Details
- Scheme Administration
 - >View Current Scheme Details
 - > Amend Scheme Details
 - >Scheme Administrator Management
 - >Practitioner Management
 - >View Submission Receipts
- Pension Service Notices for Scheme
 - >View Notices
- · Reporting
 - >Event Report
 - >Accounting for Tax
 - >Pension Scheme Return
- Quick Links
 - >The Pensions Regulator
 - >VAT
 - >Your Online Services
 - >Make a Payment
 - >Sign out

Pension Scheme Summary

Pension Scheme

The Sippdeal e-sipp

Name

Pension Scheme Tax 00605674RH

Reference (PSTR)

- > View current scheme details
- > Amend scheme details