

Write to us at:

PRUDENTIAL

LANCING

BN15 8GB

Visit us at:

pru.co.uk

PRUDENTIAL



Plan/policy number:
13490602

**Send this to your new provider with the form
if you're transferring away from the Prudential**

22 April 2021

Simon Bushell wants to transfer their Prudential pension pot to you

Simon Bushell has asked us about transferring their pension pot to you. We've sent them a pack quoting how much their pension pot will be worth if transferred, and explaining their options.

An overview of their plan

Plan number:	13490602
Plan started:	1 April 1981
Planned retirement date:	1 April 2020
Value if transferred on 22 April 2021:	£13,502.57

If the transfer goes ahead after the 30 day guarantee passes, we'll recalculate this amount on the date of the transfer. So it might change.

We need you to fill in a form

Please fill in the 'Accepting a transfer of a Prudential pension pot' form that's with this letter. Then return it to us at Prudential, Lancing, BN15 8GB.

This form gets things started, but we might need to ask you for more information at a later stage. As you know, we need to be careful to make sure that the pension plans we transfer to are properly recognised by the regulators. We'll only send you the payment after you return the enclosed form to us, and after we get the other documents we need.

Let us know if you have any questions

Just give us a call on 0345 640 2000.

Yours sincerely

Tracy Harris
Customer Service Director

Send this to your new provider for them to fill in if you're transferring away from Prudential

Accepting the transfer of a Prudential pension pot

Name(s): Simon Bushell
Plan number: 13490602
Plan type: Prudential Personal Retirement Plan

This form gets the ball rolling with the transfer of Simon Bushell's Prudential pension pot. If you're not sure about anything on it, get in touch using the contact details in our covering letter.

When you've filled it in, return it in the enclosed envelope to Prudential, Lancing, BN15 8GB.

A reminder of the plan details:

Transfer value we quoted: £13,502.57
Date it was quoted: 22 April 2021

What you're signing up to

- You confirm that Simon Bushell has asked to transfer the value of their Prudential pension pot to your plan.
- You understand that we'll recalculate the pension pot's value on the date the transfer is made if it's after the 30 day guarantee. So it might vary from what we've quoted above.
- We give authority for HMRC to give you information about the status of the pension plan shown here.
- You confirm you'll put the money we transfer to you into the pension plan shown here.

Details of the new pension plan

Please fill in this form using a black pen and BLOCK CAPITALS.

Name of the new pension plan:

Is it a UK-registered pension scheme? Tick one

Yes ☐ No ☐

If yes, what's the pension scheme tax reference?

☐ We've included a copy of the approval letter for this plan.

Is it a qualifying recognised overseas pension scheme (QROPS)? Tick one

Yes ☐ No ☐

If yes, you'll need to send us (along with this form) the letter from HMRC that confirms the pension is a QROPS.

Will the transfer be used to purchase a pension for immediate vesting?

Yes ☐ No ☐

Continued 

How we pay you

We make our payments by cheque. So please let us know who we should make the cheque out to.

Name on cheque:

Address:

Authorised signature of the pension provider

Signature

X

Date

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Job title: