

Your customer number: Beardwood1962
Our ref: 11205331
Phone: 0300 2000 555
Email: admintransfers@bandce.co.uk

the
people's
pension

20 May 2022

Registered Scheme Administrator Ltd
Venture Wales
Merthyr Tydfil Industrial Park, Pentrebach
MERTHYR TYDFIL
Mid Glamorgan
CF48 4DR

Dear Sir/Madam

Transferring pension savings from Sheridan Binnie Pension Scheme into The People's Pension - Mr Joseph Beardwood NI No: NA477126B Policy No: Beardwood1962

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, into their account with The People's Pension. Enclosed is a copy of Mr Beardwood'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.

NB: The Trustees of The People's Pension will only accept defined benefit (DB) and other safeguarded benefit transfers in the following scenarios:

- On completion and return of our 'Warranty and indemnity' form concerning the equalisation of benefits' form.
- The member has received advice from an independent financial adviser with specialist knowledge, who has given a specific recommendation to transfer to The People's Pension.

In all these scenarios we need to ensure that we have the appropriate written evidence before we can accept and process the transfer.

If your pension pot is crystallised, where your savings have been accessed or designated for drawdown, we'll not be able to accept the transfer.

Thank you in advance for your help. If you have any questions, please call **0300 2000 555**, quoting our reference number which can be found at the top of this letter.

Yours sincerely

J Murray

Joanne Murray

Member Services Administration

B&CE Financial Services Limited
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B&CE

Authorisation and request to transfer pension savings into The People's Pension



This form cannot be used to transfer savings from a Final Salary (DB) or CARE (career average) scheme. If you are considering a transfer from such a scheme you should seek guidance and advice.

Your details

Forename(s) JOSEPH	Date of birth 30 09 1962	National Insurance number NA477126B
Surname BEARDWOOD	Email joe.beardwood@me.com	
Address Fron Heulog Betws-y-coed	Phone numbers Day Evening Mobile 07816 819229	
Postcode LL24 0BL		

Financial adviser details

Fill in this part if you have a financial adviser and you're happy for us to discuss or release information on the transfer of your funds

Company name	Address	
Contact name		
Email	Postcode	Contact number

Transferring scheme details

This is the name and address of the company or scheme actually paying the transfer value over to The People's Pension Scheme.
NOTE: If you have more than one transferring scheme, please either photocopy this form prior to filling it in or contact us for a further form. We'll use an electronic transfer system known as Origo to make your transfer as long as your other pension provider also uses this. This should reduce the time taken to make the transfer. If they don't use Origo, we'll process the transfer manually, and this means it may take a little longer.

Provider/Scheme name Sheridan Binnie Pension Scheme	Address c/o Registered Scheme Administrator Ltd Venture Wales Building, Merthyr Tydfil	
Contact name (if known) Gavin McCloskey		
Policy number(s) (if appropriate) PSTR: 00797006RS	Postcode CD48 4DR	Phone number 0121 769 0041
	Total transfer value (if known) £ 234,505.73	

Does this represent the full value of your benefits under the transferring scheme? Yes ☒ No ☐

Are your benefits under the transferring scheme subject to any existing or proposed trustee in bankruptcy orders, or earmarking or pension sharing orders, or other receiving orders? ☒ Yes ☐ No

Are the sums and assets being transferred:

- (a) already entirely in drawdown
- (b) already partially in drawdown
- (c) not in drawdown?

Please note, we are unable to accept funds that have been partially/fully accessed (crystallised). Failure to disclose this will result in the funds being returned to your existing provider/ scheme.

Your declaration

I authorise, instruct and apply to the provider ('current provider') listed in the transferring scheme section of this application to transfer sums and assets from the plan(s) as listed in that section ('my plan(s)') directly to The People's Pension and to provide any instructions and/or discharge required by any relevant third party to do so.

I authorise The People's Pension, the current provider, any contributing Employer and any financial adviser named in this application to obtain from each other, and release to each other, any information that may be required to enable the transfer of sums and assets to The People's Pension.

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 current provider.

When payment is made to The People's Pension as instructed, this means that I shall no longer be entitled to receive pension benefits from the whole of my plan(s) where the whole of my plan(s) is transferring, or that part of my plan(s) represented by the payment(s) if only part of my plan(s) is transferring.

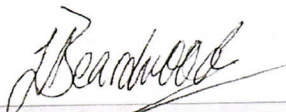
I accept that in order to comply with regulatory obligations, The People's Pension and the current provider named in this application may need to verify my identity and residential address, and may use credit reference agency searches and ask for my documents to verify my identity and address.

I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that The People's Pension and the current provider may incur as a result of any incorrect, untrue, or misleading information in this application or given by me, or on my behalf, or of any failure on my part to comply with any aspect of this application

I have read and understood the attached explanatory notes 'Things to consider before you decide to transfer'. I have not asked for advice and I have not received advice from any representative of The People's Pension Trustee Limited or its agents.

Please sign and date below:

Signature



Date

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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).

Please return to: admintransfers@bandce.co.uk or Freepost The People's Pension

Also, please keep a copy of this completed form for your own records. We will confirm to you we've received it.

If you need additional forms you can download them from your Online Account. Log in or set up at
www.thepeoplespension.co.uk/manage-account.



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For people, not profit

Transfer in to The People's Pension

from a defined benefit arrangement - warranty and
indemnity concerning the equalisation of benefits

Details

Full name of member

Date of birth

Name of transferring scheme/arrangement

Transfer payment

Declaration

In consideration of your acceptance of a transfer payment from the transferring scheme/arrangement into
The People's Pension in respect of the member:

1. We warrant that the transfer payment (including any rights relating to having been in contracted-out service) has been calculated in accordance with the equalisation requirements of Article 157 of the Treaty on the Functioning of the European Union (originally Article 119 of the Treaty of Rome) as set out in the Judgement of the European Court of Justice in Barber v. Guardian Royal Exchange (and subsequent judgements clarifying the same) for pensionable service after 17 May 1990.
2. We agree to indemnify and keep you indemnified against all liabilities, costs and expenses that you may suffer whether directly or indirectly as a result of any breach of the warranty given above.
3. We acknowledge and confirm that the terms of this warranty and indemnity are to continue to apply notwithstanding any change in the trustees of The People's Pension or the trustees or provider of the transferring scheme/arrangement.

Signature

Date

(For the Trustees of the transferring scheme/provider of the transferring arrangement)



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