

3. Customer's Declaration

I authorise you to transfer the value of my Royal London policy numbered above to the Receiving Scheme/Provider detailed below:

Receiving Scheme Name

HARLAND & PHIPPS

The transfer value we pay the Receiving Scheme may be higher or lower than shown above.

If we receive the completed Transfer Discharge Form after 10/07/2022 the actual transfer value payable to the receiving scheme/provider will be re-calculated in accordance with the terms and conditions of the relevant policy

Once we've paid the transfer value to the receiving scheme/provider, your Royal London policy referred to above will end.

Date

D 13 M 06 Y 2022

Print Name

MARK PHIPPS

Signature

You must now forward this form to the Receiving Scheme/Provider so that they can fill in Section Two.

Policy Number: 2216289

Issue Date: 10/06/2022

3. Customer's Declaration

I authorise you to transfer the value of my Royal London policy numbered above to the Receiving Scheme/Provider detailed below:

Receiving Scheme Name

HARLAND & PHIPPS

The transfer value we pay the Receiving Scheme may be higher or lower than shown above.

If we receive the completed Transfer Discharge Form after 10/07/2022 the actual transfer value payable to the receiving scheme/provider will be re-calculated in accordance with the terms and conditions of the relevant policy

Once we've paid the transfer value to the receiving scheme/provider, your Royal London policy referred to above will end.

Date

D 1 3 M 0 6 Y 2 0 2 2

Print Name

MARK PHIPPS

Signature

Mark Phipps

You must now forward this form to the Receiving Scheme/Provider so that they can fill in Section Two.

Policy Number: 8773137

Issue Date: 10/06/2022

3. Customer's Declaration

I authorise you to transfer the value of my Royal London policy numbered above to the Receiving Scheme/Provider detailed below:

Receiving Scheme Name

HARLAND & PHIPPS

The transfer value we pay the Receiving Scheme may be higher or lower than shown above.

If we receive the completed Transfer Discharge Form after 10/07/2022 the actual transfer value payable to the receiving scheme/provider will be re-calculated in accordance with the terms and conditions of the relevant policy

Once we've paid the transfer value to the receiving scheme/provider, your Royal London policy referred to above will end.

Date

D 1 4 M 0 6 Y 2 0 2 2

Print Name

MARK PHIPPS

Signature

mmj.

You must now forward this form to the Receiving Scheme/Provider so that they can fill in Section Two.

TRANSFER DISCHARGE FORM

Stakeholder Pension Plan Number:
Stakeholder Pension Plan Holder:

P000472481
Mark Phipps
DOB: 8 June 1976

This plan is a Stakeholder Pension Plan, registered with HM Revenue & Customs (HMRC) in accordance with the Finance Act 2004.

Royal London Stakeholder Pension Scheme is registered under reference number : 00613772RS.

The transfer value on 30 June 2022 amounts to £7,738.43.

Any contributions that are currently being paid into this plan will continue to be collected. Should you wish not to continue contributing then please contact us and if applicable cancel your payment instruction.

Your actual transfer value maybe higher or lower than the above estimate and will depend on:

- The value of your units on the date we make the transfer payment.
- Any future contributions you make (we have assumed none in the above estimate), include any outstanding tax relief from HMRC.
- Any other plan transactions you make e.g. fund switches.

In order to secure a fair share of the unitised with-profits fund for all investors, we may, in certain circumstances, apply a market value reduction to reduce the plan value. An example of such circumstances would be following a deep or prolonged fall in stock market values. The market value reduction will also help to ensure that large amounts leaving the Fund do not benefit one member or members over others. We will not apply a market value reduction to payments made on death or retirement; it is likely only to apply if you choose to move the funds. Please see the enclosed Product Guide for more information.

There are currently no market value reductions being applied to transfers out of the unitised with-profits fund you are invested in.



SECTION ONE (to be completed by the member)

I request that Royal London transfer the plan P000472481 to :-

Name of accepting scheme:

HARLAND & PHIPPS

Address of accepting scheme:

I understand that when this transfer is paid, this plan will be cancelled and Royal London will have no further obligation under it.

Signature :

M/M

Address :

35 Schofield Way

Bloxham

Banbury OX15 4NP

Date :

7 July 2022

Witness :

Mary Schofield

Address :

35 Schofield Way

Bloxham, Banbury

Oxfordshire

Date :

7 July 2022

On completion please pass this form and enclosed envelope to your chosen scheme for them to complete section two and return the fully completed Transfer Discharge form to us.

Policy Number: 8898516

Issue Date: 24/06/2022

Section One

TRANSFER DISCHARGE FORM

The policyholder must fill in this section to authorise us to transfer the value of their pension. Please use CAPITAL LETTERS. If you're unsure about anything, please call 0345 605 7777.

1. Personal Information

Policyholder Name

Elaine Phipps

Policy Number

8898516

Address

35 SCHOFIELDS WAY, BLOXHAM

BANBURY

Town/City

OXON

Postcode

OX15 4NP

2. Policy Details

This policy is a Personal Pension registered with HM Revenue & Customs in accordance with the Finance Act 2004.

Total Transfer Value

£26,595.00

The transfer value shown assumes you have made all payments into your policy up to and including 15/03/2008. Unless this policy has previously been made paid up, any contributions that you are currently paying into this policy will continue to be collected. Should you not wish to continue contributing then please contact us and if applicable cancel your payment instruction.

Policy Number: 8898516

Issue Date: 24/06/2022

3. Customer's Declaration

I authorise you to transfer the value of my Royal London policy numbered above to the Receiving Scheme/Provider detailed below:

Receiving Scheme Name

HARLAND & PHIPPS

The transfer value we pay the Receiving Scheme may be higher or lower than shown above.

If we receive the completed Transfer Discharge Form after 24/07/2022 the actual transfer value payable to the receiving scheme/provider will be re-calculated in accordance with the terms and conditions of the relevant policy

Once we've paid the transfer value to the receiving scheme/provider, your Royal London policy referred to above will end.

Date

D 23 M 06 Y 2022

Print Name

ELAINE PHIPPS

Signature

E Phipps

You must now forward this form to the Receiving Scheme/Provider so that they can fill in Section Two.