



Private & Confidential

Capricorn SSAS
Retirement Capital
Venture Wales Building, Merthyr Tydfil Industrial Park
Pentrebach, Merthyr Tydfil
CF48 4DR



► *Action needed*

27 June 2024

Dear Sir or Madam

Pension transfer request

Customer name: Ian Hosegood
Our references: IH & IHD
Your reference: AC2682446-002

Ian Hosegood has requested to transfer their pensions from you into a Collective Retirement Account with us. I enclose their signed transfer authority and a list of information we will need you to send us.

Please note: if the customer is approaching age 85, we will need to receive all monies at least five working days before their 85th birthday.

Sending the transfer payment

Please make the transfer payment to the following bank account details.

Account name	Quilter Life and Pensions Ltd
Sort code	56-00-68
Account number	44842864
Reference	AC2682446-002

Please include our reference number AC2682446-002 and the customer's name in the payment reference. This will help to prevent any delays allocating the transfer to the customer's account.

Alternatively, you may send us a cheque made payable to Quilter Life & Pensions Ltd. Please send this to the address shown, quoting the customer's name and our reference number, AC2682446-002.

Quilter
SUNDERLAND
SR43 4JP

T: 0808 171 2626
E: ask@quilter.com
W: quilter.com



What you need to do next

If you have any questions about this letter, you can call or email us using the details shown and we will be happy to help. Our Customer Service Centre is open 8:30am – 5:30pm, Monday to Friday.

Yours faithfully

Anthony Scammell
UK Operations Director

Quilter is the trading name of Quilter Life & Pensions Limited. Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No. 207977). Registered in England and Wales. Registered No. 04163431. Registered Office: Senator House, 85 Queen Victoria Street, London, EC4V 4AB.

To understand how we process your data please see the Privacy Notice on our website or contact us to receive a copy

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SR43 4JP

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E: ask@quilter.com
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Pension online transfer authority

NOTES

- Please complete a separate authority for each uncrystallised or crystallised account you are transferring from the ceding scheme named in this authority.
- If the transfer is not being processed using the Options Transfer Service, or it is Out of Scope, you will need to return the Transfer Scheme Authority and complete and attach a discharge form (where appropriate) from the ceding scheme. Your financial adviser will be able to help you with this.
- If you wish to take an immediate payment of tax-free cash that exceeds £50,000 from this investment ask your financial adviser for the form entitled **Instruction to pay Tax-free Cash and Income**.
- A new account will be created each time you transfer in crystallised pension benefits (also known as income drawdown).
- Quilter will only contact the transferring pension provider once all relevant information has been received in respect of this transfer, including completion of the Financial Adviser's Declaration at the end of this authority.
- For cash transfers, if any assets are suspended and cannot therefore be sold:
 - for a full transfer, we will arrange to re-register the suspended asset (where possible) provided at least one other asset can be transferred as cash
 - for a partial transfer, we will seek revised instructions.

Date issued: 18 June 2024

This is the authority for the transferring scheme named below to transfer your pension to Quilter.

Account number:

AC2682446-002

Customer details

Customer name:

Mr Ian Hosegood

Residential address:

Woodsorrel
11 Sandstone Rise
Winterbourne
Bristol
BS36 1BB

Date of birth:

14 January 1958

National Insurance number:

WL020928D

OMW_D28/AC2682446/1of8

Quilter
SUNDERLAND
SR43 4JP
T: 0808 171 2626
E: ask@quilter.com
W: quilter.com



Transferring scheme details

Transferring scheme manager:

Capricorn SSAS

Transferring scheme address:

Retirement Capital
Venture Wales Building, Merthyr Tydfil Industrial Park
Pentrebach, Merthyr Tydfil
CF48 4DR

Transferring scheme account number:

IH

Transferring scheme type:

- ☐ Deferred annuity ☐ S32 Buyout ☐ FSAVC ☒ Occupational Pension Scheme
☐ Personal Pension ☐ Self-invested Pension Plan ☐ Stakeholder ☐ S226/RAC

Estimated transfer amount

Uncrystallised value:

£336,173.00

Total estimated transfer value:

£336,173.00

This represents the full value of the plan being transferred

Type of transfer:

Cash transfer

Is the current plan subject to any existing or proposed:

- trustee in bankruptcy orders? ☒ No ☐ Yes*
- earmarking orders? ☒ No ☐ Yes*
- pension sharing orders? ☒ No ☐ Yes*
- other receiving orders? ☒ No ☐ Yes* ► please specify

* If you have answered 'Yes' to any of the questions above, please contact us on 0808 171 2626 so that we can determine whether we can proceed with the transfer.

For block transfers only

► *this means the transfer of at least two members from the same scheme, at the same time, into the same scheme of which they cannot have been members for more than a year at the point the transfer is completed.*

Name(s) of other transferring member(s):

Protected low pension age

Protected tax-free lump sum
value at A-day

£

A-Day fund value

£



Declaration

1. Applications for transfer payments

I wish to proceed with the transfer shown in this form based on the following information.

- a) I confirm that I have received a personal recommendation from a financial adviser named in this form to transfer sums and/or assets from the plan(s) listed in this form to Quilter.
- b) I understand both the adviser's advice and the risks associated with the transfer.
- c) I authorise and instruct you to transfer the assets from the plan(s) listed in this form directly to Quilter and to provide any instructions and/or discharge required by any relevant third party to do so.
- d) I authorise Quilter, the current provider and any financial intermediary 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 Quilter.
- e) I authorise Quilter, the current provider and any employer paying contributions to any account(s) listed in the 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 Quilter.
- f) I accept that in order to comply with regulatory obligations, Quilter 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.
- g) I understand that until this application is accepted and complete, Quilter Life & Pensions Limited's responsibility is limited to returning the amount received from each of the current providers listed in this application to them.
- h) I understand that when the payment is made to Quilter as requested, this means that I shall no longer be entitled to receive pension benefits from the whole of the account(s) listed in the application where the whole of the account(s) is (are) transferring, or part of the account(s) represented by the payments if only part of the account(s) is (are) transferring.
- i) I have read any information provided or made available to me by the current provider in connection with this transfer.
- j) I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Quilter and the current provider may incur as a result of any incorrect, untrue, misleading or inaccurate information in this application or given by me, or on my behalf, or any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original document(s) in return for the transfer of funds and I am unable to do so.

2. If I have requested re-registration:

- a) I authorise the ceding scheme to re-register the assets as detailed with immediate effect to Quilter Life & Pensions Limited - Designation 'OMWLP', Senator House, 85 Queen Victoria Street, London, EC4V 4AB.
- b) I understand that if Quilter holds a preferential share class for an asset being re-registered, Quilter will convert the asset to the preferential share class once it has been re-registered.
- c) I authorise the ceding scheme to sell any of my assets that cannot be re-registered for whatever reason, and to transfer the cash proceeds (if possible) to Quilter.

3. If I have requested a cash transfer:

- I authorise the ceding scheme to sell the assets in my account and to transfer the cash proceeds in pounds sterling to Quilter Life & Pensions Limited.
- and an asset included in my request is suspended, I authorise the transferring provider to re-register the asset in line with point 2.



4. I understand that any sale of Exchange Traded Instruments (ETIs) may incur the ceding scheme's dealing charges.
5. I authorise the ceding scheme to transfer any cash proceeds to Quilter Life and Pensions Ltd Transfers Account (NatWest, sort code 56-00-68, account number 44842864) stating my account number with Quilter as the reference (or, if not known, my name).

Signature

Customer Name: Ian Hosegood

Date (dd/mm/yyyy)

18 / 06 / 2024



FCA PERMISSIONS DECLARATION – MUST BE COMPLETED BY YOUR FINANCIAL ADVISER

This section must be completed for the authority to be accepted. The adviser firm, or an associated firm, must hold the relevant permission to be able to advise on the type of transfer shown in this form.

In relation to the transfer, or partial transfer, shown in this form, are any safeguarded benefits being given up in order to pay the transfer value?

☐

Yes

☒

No

Does the firm have the appropriate FCA permission to advise the client to make this transfer?

☒

Yes

☐

No - Provide details below of the firm with the appropriate FCA authorisation that provided the personal recommendation in relation to the transfer(s).

Name and address of the firm

CACTUS FINANCIAL PLANNING, 12 IMPERIAL SQ.

CHELSEHAM GL50 1QB

FCA registration number ► if known

990743

NOTES

Safeguarded benefits are benefits which are neither flexible benefits nor cash balance benefits. Broadly, this means guaranteed pension benefits, such as those offered by defined benefits (DB) occupational pension schemes, deferred annuity contracts with a guarantee and conventional retirement annuity contracts with guaranteed annuity rates.

Due to the complex nature of transfers where safeguarded benefits are involved, we will not accept such transfers on a non-advised, or execution-only, basis regardless of the size of the transfer value and/or the FCA permissions which the adviser holds. We do not accept 'insistent client' transfers.

Please ensure you sign overleaf, and complete the Transfer Declaration if applicable.



Acceptance of the transfer request

- Quilter will only accept a Transfer Request if the box relating to the six statements above has been ticked by your financial adviser (or your financial adviser has provided a separate signed declaration making the same statements) and all our other requirements have been met.
- Failing to provide this confirmation will delay the potential acceptance of your Transfer Request. If any such delay means that the transfer does not proceed within the Cash Equivalent Transfer Value (CETV) guarantee period that currently applies, this may affect your transfer value. Quilter will not be liable for any re-calculation fee, or potential drop in the transfer value following such a re-calculation.
- Quilter will decline this application if your financial adviser cannot provide this confirmation.

Transfer documentation

- It is important to submit the transfer request, with any documentation required by the ceding scheme, as soon as possible.
- Quilter cannot guarantee that the transfer request will be processed by the end of the CETV guarantee period. However, to reduce the risk of missing the CETV deadline, Quilter needs all related documentation at least 5 working days before the end of the CETV guarantee period.
- Quilter accepts no liability for any costs, claims or liabilities arising from a missed CETV guarantee period.

FINANCIAL ADVISER'S DETAILS AND SIGNATURE

Financial adviser's signature

SCL

Date (dd/mm/yyyy)

18 / 06 / 2024

Print name

Simon Carlin

Firm

CACTUS FINANCIAL PLANNING LTD

Send the completed form to:
Quilter, SUNDERLAND, SR43 4JP

Quilter is the trading name of Quilter Investment Platform Limited and Quilter Life & Pensions Limited. Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority (Financial Services Register No. 165369). Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No. 207977). Registered in England and Wales. Registered No. 01690071 and 04163431 respectively. Registered Office: Senator House, 85 Queen Victoria Street, London, EC4V 4AB.

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OMW_D28/8of8

Quilter
SUNDERLAND
SR43 4JP

T: 0808 171 2626
E: ask@quilter.com
W: quilter.com

TRANSFER DECLARATION – Safeguarded benefits (other than transfers involving guaranteed annuity rates)

For completion by financial advisers only.

This section applies to transfers of guaranteed pension benefits, such as those offered by defined benefits (DB) occupational pension schemes and deferred annuity contracts with a guarantee. It is not applicable for safeguarded benefit transfers involving only guaranteed annuity rates or where the applicant cannot remain in the scheme.

Quilter will only accept the transfer if all the following statements apply:

- ☐ For this transfer, where the client is proposing to give up some, or all, of their safeguarded benefits, I have ticked here, and in the appropriate contingent charging section below, as the client's financial adviser to confirm all of the following points:
- a) the client has received a transfer value comparator in line with COBS 19.1.3A; and
 - b) an appropriate pension transfer analysis in line with COBS 19.1.2B has been carried out; and
 - c) this application to transfer is being submitted on behalf of the client in line with a 'personal recommendation to transfer' and full advice; and
 - d) the client is not an 'insistent client'; and this transfer is not being transacted on an 'execution only' basis; and
 - e) to the best of my knowledge and belief, the client understands how the key outcomes from the appropriate pension transfer analysis and the transfer value comparator contribute towards the personal recommendation to transfer.
 - f) Please tick the appropriate option(s) below.
- ☐ i. Contingent charging has not been used
- or
- ☐ ii. The client agreed to be charged on a contingent basis and the:
- ☐ a) client's medical condition has given them a life expectancy of less than 75 and/or
 - ☐ b) client is in serious financial difficulty.



Pension online transfer authority

NOTES

- Please complete a separate authority for each uncrystallised or crystallised account you are transferring from the ceding scheme named in this authority.
- If the transfer is not being processed using the Options Transfer Service, or it is Out of Scope, you will need to return the Transfer Scheme Authority and complete and attach a discharge form (where appropriate) from the ceding scheme. Your financial adviser will be able to help you with this.
- If you wish to take an immediate payment of tax-free cash that exceeds £50,000 from this investment ask your financial adviser for the form entitled **Instruction to pay Tax-free Cash and Income**.
- A new account will be created each time you transfer in crystallised pension benefits (also known as income drawdown).
- Quilter will only contact the transferring pension provider once all relevant information has been received in respect of this transfer, including completion of the Financial Adviser's Declaration at the end of this authority.
- For cash transfers, if any assets are suspended and cannot therefore be sold:
 - for a full transfer, we will arrange to re-register the suspended asset (where possible) provided at least one other asset can be transferred as cash
 - for a partial transfer, we will seek revised instructions.

Date issued: 18 June 2024

This is the authority for the transferring scheme named below to transfer your pension to Quilter.

Account number:

AC2682446-002

Customer details

Customer name:

Mr Ian Hosegood

Residential address:

Woodsorrel
11 Sandstone Rise
Winterbourne
Bristol
BS36 1BB

Date of birth:

14 January 1958

National Insurance number:

WL020928D

OMW_D28/AC2682446/1of8

Quilter
SUNDERLAND
SR43 4JP
T: 0808 171 2626
E: ask@quilter.com
W: quilter.com



Transferring scheme details

Transferring scheme manager:

Capricorn SSAS

Transferring scheme address:

Retirement Capital
Venture Wales Building, Merthyr Tydfil Industrial Park
Pentrebach, Merthyr Tydfil
CF48 4DR

Transferring scheme account number:

IHD

Transferring scheme type:

- ☐ Deferred annuity ☐ S32 Buyout ☐ FSAVC ☒ Occupational Pension Scheme
☐ Personal Pension ☐ Self-invested Pension Plan ☐ Stakeholder ☐ S226/RAC

Estimated transfer amount

Crystallised value:

£6,848.00

Total estimated transfer value:

£6,848.00

This represents the full value of the plan being transferred

Type of transfer:

Cash transfer

Account details

Type of drawdown:

Flexi-access drawdown

Money Purchase Annual Allowance does not apply

This transfer is not respect of a beneficiary drawdown arrangement

Quilter

Is the current plan subject to any existing or proposed:

- trustee in bankruptcy orders? ☒ No ☐ Yes*
- earmarking orders? ☒ No ☐ Yes*
- pension sharing orders? ☒ No ☐ Yes*
- other receiving orders? ☒ No ☐ Yes* ► please specify

* If you have answered 'Yes' to any of the questions above, please contact us on 0808 171 2626 so that we can determine whether we can proceed with the transfer.

For block transfers only

► this means the transfer of at least two members from the same scheme, at the same time, into the same scheme of which they cannot have been members for more than a year at the point the transfer is completed.

Name(s) of other transferring member(s):

Protected low pension age

Protected tax-free lump sum
value at A-day

£

A-Day fund value

£



Declaration

1. Applications for transfer payments

I wish to proceed with the transfer shown in this form based on the following information.

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- b) I understand both the adviser's advice and the risks associated with the transfer.
- c) I authorise and instruct you to transfer the assets from the plan(s) listed in this form directly to Quilter and to provide any instructions and/or discharge required by any relevant third party to do so.
- d) I authorise Quilter, the current provider and any financial intermediary 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 Quilter.
- e) I authorise Quilter, the current provider and any employer paying contributions to any account(s) listed in the 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 Quilter.
- f) I accept that in order to comply with regulatory obligations, Quilter 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.
- g) I understand that until this application is accepted and complete, Quilter Life & Pensions Limited's responsibility is limited to returning the amount received from each of the current providers listed in this application to them.
- h) I understand that when the payment is made to Quilter as requested, this means that I shall no longer be entitled to receive pension benefits from the whole of the account(s) listed in the application where the whole of the account(s) is (are) transferring, or part of the account(s) represented by the payments if only part of the account(s) is (are) transferring.
- i) I have read any information provided or made available to me by the current provider in connection with this transfer.
- j) I accept responsibility in respect of any claims, losses, expenses, additional tax charges or any penalties that Quilter and the current provider may incur as a result of any incorrect, untrue, misleading or inaccurate information in this application or given by me, or on my behalf, or any failure on my part to comply with any aspect of this application. This includes where I have been asked to provide any original document(s) in return for the transfer of funds and I am unable to do so.

2. If I have requested re-registration:

- a) I authorise the ceding scheme to re-register the assets as detailed with immediate effect to Quilter Life & Pensions Limited - Designation 'OMWLP', Senator House, 85 Queen Victoria Street, London, EC4V 4AB.
- b) I understand that if Quilter holds a preferential share class for an asset being re-registered, Quilter will convert the asset to the preferential share class once it has been re-registered.
- c) I authorise the ceding scheme to sell any of my assets that cannot be re-registered for whatever reason, and to transfer the cash proceeds (if possible) to Quilter.

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Signature

Customer Name: Ian Hqsegood

Date (dd/mm/yyyy)

18 / 06 / 2024



FCA PERMISSIONS DECLARATION – MUST BE COMPLETED BY YOUR FINANCIAL ADVISER

This section must be completed for the authority to be accepted. The adviser firm, or an associated firm, must hold the relevant permission to be able to advise on the type of transfer shown in this form.

In relation to the transfer, or partial transfer, shown in this form, are any safeguarded benefits being given up in order to pay the transfer value?

☐ Yes

☒ No

Does the firm have the appropriate FCA permission to advise the client to make this transfer?

☒ Yes

☐ No - Provide details below of the firm with the appropriate FCA authorisation that provided the personal recommendation in relation to the transfer(s).

Name and address of the firm

CACTUS FINANCIAL PLANNING, 12 IMPERIAL SQ.

CHELTENHAM GL50 1QB

FCA registration number ► if known

990743

NOTES

Safeguarded benefits are benefits which are neither flexible benefits nor cash balance benefits. Broadly, this means guaranteed pension benefits, such as those offered by defined benefits (DB) occupational pension schemes, deferred annuity contracts with a guarantee and conventional retirement annuity contracts with guaranteed annuity rates.

Due to the complex nature of transfers where safeguarded benefits are involved, we will not accept such transfers on a non-advised, or execution-only, basis regardless of the size of the transfer value and/or the FCA permissions which the adviser holds. We do not accept 'insistent client' transfers.

Please ensure you sign overleaf, and complete the Transfer Declaration if applicable.

TRANSFER DECLARATION – Safeguarded benefits (other than transfers involving guaranteed annuity rates)

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Quilter will only accept the transfer if all the following statements apply:

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- b) an appropriate pension transfer analysis in line with COBS 19.1.2B has been carried out; and
- c) this application to transfer is being submitted on behalf of the client in line with a 'personal recommendation to transfer' and full advice; and
- d) the client is not an 'insistent client'; and this transfer is not being transacted on an 'execution only' basis; and
- e) to the best of my knowledge and belief, the client understands how the key outcomes from the appropriate pension transfer analysis and the transfer value comparator contribute towards the personal recommendation to transfer.
- f) Please tick the appropriate option(s) below.

☐ i. Contingent charging has not been used

or

☐ ii. The client agreed to be charged on a contingent basis and the:

- ☐ a) client's medical condition has given them a life expectancy of less than 75 and/or
- ☐ b) client is in serious financial difficulty.



Acceptance of the transfer request

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- Quilter will decline this application if your financial adviser cannot provide this confirmation.

Transfer documentation

- It is important to submit the transfer request, with any documentation required by the ceding scheme, as soon as possible.
- Quilter cannot guarantee that the transfer request will be processed by the end of the CETV guarantee period. However, to reduce the risk of missing the CETV deadline, Quilter needs all related documentation **at least 5 working days before the end of the CETV guarantee period.**
- Quilter accepts no liability for any costs, claims or liabilities arising from a missed CETV guarantee period.

FINANCIAL ADVISER'S DETAILS AND SIGNATURE

Financial adviser's signature

SCL

Date (dd/mm/yyyy)

18 / 06 / 2024

Print name

SIMON CARLIN

Firm

CACTUS FINANCIAL PLANNING LTD

Send the completed form to:
Quilter, SUNDERLAND, SR43 4JP

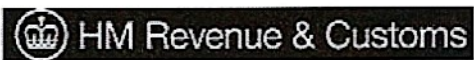
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To understand how Quilter process your data please see the Privacy Notice on our website or contact us to receive a copy.

OMW_D28/8of8

Quilter
SUNDERLAND
SR43 4JP

T: 0800 171 2626
E: ask@quilter.com
W: quilter.com



- [Home](#)
- [Contact us](#)
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- [Sign out](#)

User Name: (A0009732)
PSTR 00615957RJ

Pension Schemes - View Current Scheme Details



Your HMRC Services

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Current scheme details	
Pension Scheme Name	Quilter Personal Pension Scheme
Deferred annuity contract / Retirement annuity contract made after 5 April 2006	No
Date scheme registered	19 Apr 2006
Name of Scheme Administrator who registered the scheme	Quilter Life & Pensions Ltd

Scheme status	Open
Sub-scheme	No
Pension scheme structure	Other - Contract-Based
The scheme is an investment regulated pension scheme 	No
Band of number of scheme members	10001+
Registered for Relief at source	Yes
Occupational pension scheme 	No
Country or Territory scheme established	UNKNOWN

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