True Potential

Newburn House,

Gateway West,

Newburn Riverside,

Newcastle upon Tyne,

NE15 8NX

6th September 2023

Client name: **Lucy Bowers**

Pension Company Policy/Plan Number: **P0755 – 30790 – 00396**

To Whom it may concern,

Please find enclosed a completed application from Lucy Bowers to transfer her pension out into a SSAS called “Bowers SSAS”, together with the following documents:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Screen shot
5. TPR Registration Certificate
6. ICO Certificate
7. Company Contribution Schedule
8. Company Employment Letter
9. Personal Bank Statement XXXX
10. 3 months Payslips
11. Authority Letter
12. SSAS Statement
13. Members Guide

I would be most grateful if you may process Lucy Bowers’s request at your earliest convenience. Should you require any further information, please do not hesitate to contact us.

Yours Sincerely



Lisa Welton

Scheme Administrator