



Lisa Welton <lisa@retirement.capital>

Transfer of SJP pension funds into CHL Investment SSAS

1 message

Lisa Welton <lisa@retirement.capital>

29 August 2023 at 14:00

To: chamlettedger@gmail.com, Claire Hamlett-Ledger <claire@chl-finance.co.uk>

Cc: Georgina Martin <georginam@retirement.capital>

Dear Claire,

Please see the two attachments "**transfer pack**" and "**transfer process in**" document, as an explanation of what we need to prepare and send to the ceding scheme where your pension is currently held, along with the costs involved. The transfer pack is payable upon the ceding scheme confirming receipt of the application. We will provide documents including pre-completed letters for members to review and sign.

Please advise if any of the transfer you intend to make will be a transfer of the assets directly into the SSAS rather than a disinvestment cash transfer. This is called an in-specie transfer which we need to be aware of for the transfer process.

We have a dedicated team working on transfers as they can be time consuming and require accurate information from the beginning to ensure the transfer is not rejected. We have many years of experience in dealing with transfers and have put this pack together given our experience. If at any time you do not want us to make 'chaser correspondence' just let us know - that is fine.

As per the attached 'transfer process in' document. It is most important:

1. Please set up a standing order for **contributions from the sponsoring employer** "CHL Investment Ltd" into the SSAS bank account as soon as possible. A min of £ 100.00 each person transferring per month. Transfers to be made with the reference ER + Name for our internal reference. One of the requirements from ceding schemes are to show a minimum of 3 months employer contributions

Account Name : **CHL INVESTMENTS SSAS**

Account Number : **45488535**

Sort Code: **23-05-80**

2. Also that you have **PAYE in place from the sponsoring employer** "CHL Investment Ltd" and will be able to supply **personal bank statements** showing your salary payments to match your payslips. This is another one of the requirements from the ceding schemes are to show a minimum of the last 3 months **PAYE & personal statements**

3. Supply your latest valuation and policy details from the ceding scheme

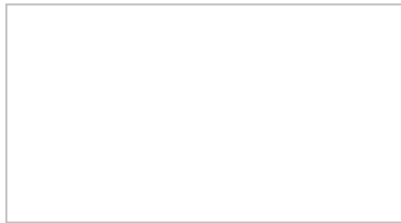
4. You will need to contact your current pension provider to request the transfer out forms (we are unable to use Origo or Options to SSAS).

I look forward to hearing from you. If you have any further questions, please do not hesitate to contact me

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.



Web. <https://retirement.capital>

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Data Processing Centre

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----- Forwarded message -----

From: **Claire Hamlett-Ledger** <claire@chl-finance.co.uk>

Date: Mon, Aug 21, 2023 at 4:33 PM

Subject: Pension

To: Jon Pittey <Jon.Pittey@sjpp.co.uk>

Cc: David Nicklin <davidn@retirement.capital>, Georgina Martin <georginam@retirement.capital>

Hi Jon,

I hope you are well.

Just wanted to let you know that I am wanting to transfer my funds in my SJP pension over to my SSAS. CHL Investments SSAS

The reason is that the SSAS is performing very well at the moment and if I were in my 20s then I could leave it where it is with SJP to recover. Time is not on my side unfortunately and I have to be realistic.

This is by no means anything personal and your support has been exemplary and I hope you will support me in this transfer decision.

The person who is the pension administrator at Retirement Capital is davidn@retirement.capital and Georgina Martin georginam@retirement.capital

They will let you know what they need to make this happen.

Thanks

Claire

Best Regards

Claire Hamlett-Ledger CeMAP

Mortgage and Protection Adviser

CHL Finance Ltd

Mob :07990 975402



Book a call with me by clicking on this link

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<https://www.mortgagesbroker.co.uk/>



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Registered in England Number: 12293510.

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Kind regards
Georgina

Retirement
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5 attachments



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 **02. transfer process in 5 Steps.pdf**
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 **01. Transfer Pack SSAS.pdf**
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