St James's Place Craig fourth

Administration centre

PO Box 9034

Chelmsford

CM99 2XA

13th September 2023

Client name: **Claire Hamlett-Ledger**

Pension Company Policy/Plan Number: **RA24186587**

To Whom it may concern,

Please find enclosed a completed application from Claire Hamlett-Ledger to transfer her pension out, into a SSAS called ‘CHL Investments SSAS’, together with the following documents:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Screen shot
5. Company Contribution Schedule
6. Company Employment Letter
7. Personal Bank Statement Aug - Nov 2023
8. 3 months Payslips (Sep, Oct, Nov 2023)
9. Tax Return 2023
10. Authority Letter
11. SSAS Metro Statement
12. SSAS Metro Bank account details
13. Members Guide

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

Yours Sincerely

Close-up of a signature

Description automatically generated

Lisa Welton

Scheme Administrator