



Lisa Welton <lisa@retirement.capital>

CHL Investment SSAS - Transfer from SPJ

1 message

Lisa Welton <lisa@retirement.capital>
To: chamlettledger@gmail.com
Cc: Georgina Martin <georginam@retirement.capital>

27 September 2023 at 13:36

Good morning Claire

I just wanted to touch base on this, so it is clear...

The employer contributions will need to continue monthly throughout the transfer process until all of your transfers are completed. The same with PAYE. You will need to be able to show personal bank statements to show the payments matching payslips of salary.

Currently I have no information or policy details about your pension with SPJ. Please can you supply the last valuation you have received from them.

Kind Regards,

Lisa

From: **Claire Hamlett-Ledger** <claire@chl-finance.co.uk>
Date: Sat, Sep 23, 2023 at 9:41 AM
Subject: SSAS Lending
To: Georgina Martin <georginam@retirement.capital>
Cc: David Nicklin <davidn@retirement.capital>, Martin Olsen <martin.olsen@chl-finance.co.uk>, Claire Hamlett-Ledger <chamlettledger@gmail.com>

Hi Gina,

I hope you are well. I spoke to David yesterday and we have some terms that we can offer

Martin Olsen for the purchase of the commercial Office in Edinburgh.

We can lend £60k so if you could help me with showing proof of funds as some of the funds were in Novia

Don't know whether they have been transferred into SSAS Account?

We have agreed 10% interest per year so normal payments are £500 per month, with first 3 payments to

Be rolled up to be paid on month 3 so £1500 then payments return back down to £500 for the remainder of the term.

Term to be a maximum of 5 years with no early repayment charge.

1st charge over the property to be backed up with a RICs survey to check value.

£1500 fee for arranging this to be paid to the SSAS to cover charges to set this up.

I have paid my first £100 to SSAS as discussed on 14th Sept going to make another one on the 1st Oct then 14th Oct

From CHL Finance Ltd. I can get the ball rolling with the SJP transfer no problem will follow the instructions Lisa Welton gave me.

Will let you know solicitors when we have found some we will probably do dual rep to save costs and time.

Anything I have forgotten let me know but if you can send me proof of funds I can send this onto Martin so he can make an offer.

Thanks

Claire

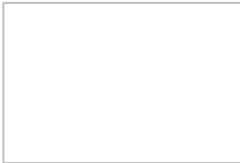
Best Regards

Claire Hamlett-Ledger CeMAP

Mortgage and Protection Adviser

CHL Finance Ltd

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Kind regards
Georgina

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