

Re: SJP Pension Transfer out request - RA24186587 Claire Hamlett-Ledger - CHL Investment SSAS

To sjpac.clientcare@sjpadmin.co.uk • dischargeforms@sjpadmin.co.uk •
Jon.Pitney@sjpp.co.uk <jon.pitney@sjpp.co.uk> Copy chamlettledger@gmail.com Blind copy
lisa@retirement.capital

Dear Transfers team,

Client name: **Claire Hamlett-Ledger**
Pension Company Policy/Plan Number: **RA24186587**

Please find attached the requested claim form signed by the member. I called and spoke to Martin on 11/01 as I believe there should be another page for the transfer bank details to be completed. Martin took the bank details over the phone adding them into the system and requesting the complete forms be sent again. The member has not received the complete claim form only the page attached.. So just to confirm the bank details are as follows:

Account name: **CHL INVESTMENTS SSAS**
Account number: **45488535**
Sort code: **23-05-80**
Ref: PTI- **Claire**

Kind regards
Lisa Welton
RC Administration Limited

Phone: 0330 311 0839

1A Park Lane
Poynton
Cheshire
SK12 1RD

Company Number: 12409200

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On 13/12/2023 12:52 GMT info@rcadministration.com wrote:

----- Original Message -----

From: info@rcadministration.com
To: Jon.Pitney@sjpp.co.uk, dischargeforms@sjpadmin.co.uk, sjpac.clientcare@sjpadmin.co.uk
CC: chamlettledger@gmail.com
Date: 13/12/2023 12:37 GMT
Subject: SJP Pension Transfer out request - RA24186587 Claire Hamlett-Ledger - CHL Investment SSAS

Dear Transfers team,

Client name: **Claire Hamlett-Ledger**
Pension Company Policy/Plan Number: **RA24186587**

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
14. Cover letter

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.

Kind regards
Lisa Welton

RC Administration Limited

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- SJP Transfer Letter3.pdf (957 KB)