

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

Dear Transfers team,

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

Please can you process the transfer by BACs.. The member has just received for the 3rd time a form to complete for you to post a cheque. Please find attached the completed form with the request to send the transfer of the funds by BACs with the Scheme bank details.

Kind regards
Lisa Welton

RC Administration Limited

Phone: 0330 311 0839

1A Park Lane
Poynton
Cheshire
SK12 1RD

Company Number: 12409200

IMPORTANT - PLEASE NOTE The information transmitted is intended only for the person or entity to which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of or taking of any action in reliance upon this information by persons or entities other than the intended recipient is prohibited. If you received this in error please contact the sender and destroy this email.

On 13/03/2024 10:49 GMT info@rcadministration.com wrote:

Dear Transfers team,

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

Please find attached the below listed document:

1. A claim form dated 09 February signed & dated by the member. We require transfer by BACs not a cheque. The part in-completed is to receive a cheque. The Bank details are now on the bottom of the form.

I have just spoken to Summer who has advised you have sent the claim form for a 3rd time now advising it is in-complete. **Please process this transfer by BACs. We do not accept cheques.**

Kind regards
Lisa Welton

RC Administration Limited

Phone: 0330 311 0839

1A Park Lane
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SK12 1RD

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On 20/02/2024 13:58 GMT info@rcadministration.com wrote:

Dear Transfers team,

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

Please find attached the below listed documents:

1. A claim form dated 09 February signed & dated by the member. She advises she only received this yesterday.
2. I have also attached the scheme bank account details.

Please continue your transfer process. **If you require any further information please do not hesitate to contact me back**

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 24/01/2024 11:24 GMT info@rcadministration.com wrote:

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

Phone: 0330 311 0839

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- SJP Form scan 15-3-24.pdf (406 KB)