B&CE Financial Services Ltd
Manor Royal

Crawley

West Sussex

RH10 9QP

Date: 26/08/2021

Dear Sirs,

**Member Name: Harry Francis Smith
DOB: 04/02/1999
Customer Number: 3512114

Member Name: Emma Smith
DOB: 19/01/1967
Customer Number: 3512113**

**Member Name: Anthony Arthur Smith
DOB: 20/10/1961
Customer Number: 3512112**

Thank you for your emails dated 18/08/2021 regarding transfer of the above policies to Cannes 2003 ORBS.

Please find below the additional information requested for the receiving scheme:

* Type of scheme: SSAS (Small Self-Administered Scheme)
* The Principal Employer of the scheme is ELEVATION WEALTH MANAGEMENT LIMITED (Company No. 04794182) of Elevation House, Unit 1 Marlin Office Village, Chester Road, Castle Vale, Birmingham, B35 7AZ
* The Registered Scheme Administrator is Anthony Smith of Manor Barn, Manor Lane, Whilton, DAVENTRY, NN11 2UH
* A copy of the HMRC registration certificate has been attached.
* Parties involved in running of the scheme are:

**RC Administration Ltd** - An appointed Practitioner who looks after day-to-day administration of the scheme and reporting to HMRC.

**Elevation Wealth Management Ltd** - Sponsoring Employer and IFA

**Anthony Smith** - Registered Scheme Administrator

* The scheme trustees are:
1. **Anthony Smith** of Manor Barns Manor Lane Whilton Northants NN11 2 UH
2. **Emma Smith** of Manor Barns Manor Lane Whilton Northants NN11 2 UH
3. **Harry Smith** of Manor Barns Manor Lane Whilton Northants NN11 2 UH
4. **Colin Fell** of The Firs Main Street Alne North Yorkshire YO61 1RS
* A copy of the Trust Deed governing the scheme has been attached along with any subsequent Deeds and scheme rules.
* The FCA registration number for Elevation Wealth Management Ltd is 456358.
* The ICO registration number for Cannes 2003 ORBS is ZA086462.

 If you require any further information, please do not hesitate to contact us.

Thank you in advance for your assistance.

Yours faithfully

Georgina Martin

**For and on behalf of
RC Administration Limited**
info@rcadministration.com

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