



Lisa Welton <lisa@retirement.capital>

Re: Transfer out - SW3390621 Simon Pryce - De Payen SSAS

1 message

Lisa Welton <lisa@retirement.capital>

13 June 2023 at 12:23

To: Simon Pryce <simon@skylightmedia.co.uk>

Cc: Veronica Walkman <veronica@retirement.capital>

Morning Simon,

Please send it back to them by **email** and if you have to their **online portal upload** all of the documents this way... (you can also send by post if they sent it to you by post).

I have attached the below listed documents for you to send as they have requested with the questionnaire:

1. Completed SW Information form
2. SSAS Trust Deed
3. Scheme Rules
4. Company Employment Letter
5. Company Contributions Letter
6. SSAS Bank Statement
7. March Personal Bank Statement
8. April Personal Bank Statement
9. Feb, Mar & April Payslips

Please also send them the below (I dont have these on file yet):

1. Your May Personal Bank Statement for
2. Your May Payslip

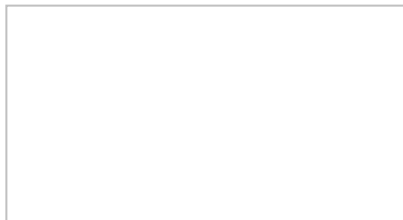
If you upload these to their online portal please ask them to confirm they have received everything.

Please advise me once you have returned these to them so I can contact them to make sure they have received them and get an update from them.

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.

Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: lisa@retirement.capital

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Retirement.Capital

Venture Wales Building
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On Mon, 12 Jun 2023 at 17:16, Simon Pryce <simon@skylightmedia.co.uk> wrote:

Hi Lisa,

Thanks for keeping me on my toes.

I've attached the scanned doc, so you can have a check before I stick it in the post, as I may have entered incorrect details!

Then, should I send it electronically to them? I suppose the question to ask is, is there any further information I should send to them, or just the De Payen SSAS proof?

Kind regards,

Simon

On Mon, Jun 12, 2023 at 9:41 AM Lisa Welton <lisa@retirement.capital> wrote:

Good morning Simon,

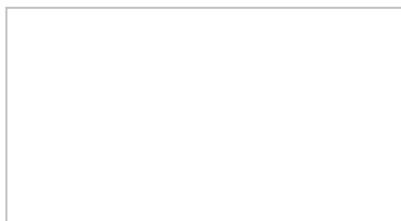
I hope you had a great weekend and all is well...

Please can you let me know once you have sent the questionnaire back to them so I can keep on top of them. Also if you can send a copy of the completed doc so I can save for our records.

Kind Regards,

Lisa

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On Fri, 9 Jun 2023 at 14:12, Simon Pryce <simon@skylightmedia.co.uk> wrote:

Thank you Lisa, this is just great. I'll get it done over the weekend and sent back Monday.

Have a super weekend.

Simon

On Fri, Jun 9, 2023 at 12:54 PM Lisa Welton <lisa@retirement.capital> wrote:

Hi Simon

I have attached a new blank Scottish Widows form

Pg1. Plan Number : SW3390621

Q13. I fully understand that nature of a SSAS and how a SSAS works

Q22. Yes - (the money will be held your SSAS Metro bank account)

Q29. Fees applied to the transfer are 350.00

Q30. Yes - (I have attached for your ref the Services Agreement, you should already have a copy of this)

Q31. Yes

Q32. No

Q33. No

Q34. Yes

a) Yes

b) Skylight Media Limited

c) 12 Poplars Court Lenton Lane, Nottingham, Nottinghamshire, NG7 2RR

e) RC Administration Limited

Q35.

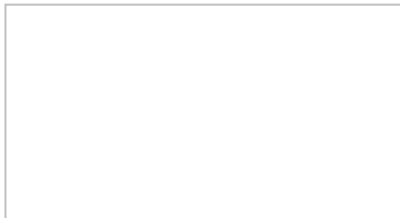
a) No (your company has been actively trading since 2004)

If you have any questions please do not hesitate to contact us back.

Kind Regards,

Lisa

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On Fri, 9 Jun 2023 at 11:54, Simon Pryce <simon@skylightmedia.co.uk> wrote:
D'oh! Yes, I forgot to attach it.

BTW, I'm heading for Gosport in a couple of weeks. I won't be dropping in, but it'll be great to be back in the area!

Simon

On Fri, Jun 9, 2023 at 10:26 AM Simon Pryce <simon@skylightmedia.co.uk> wrote:
Here you are Lisa, if you can read my scrawl. At least if there's another version on the way I can rewrite some of the answers!

And they're very thorough aren't they? It's *my* bloody money!!

Si

On Fri, Jun 9, 2023 at 8:59 AM Lisa Welton <lisa@retirement.capital> wrote:

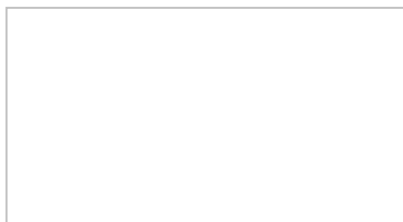
Hi Simon

Send it to me

Kind Regards,

Lisa

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On Fri, 9 Jun 2023 at 09:06, Simon Pryce <simon@skylightmedia.co.uk> wrote:

I've completed some of it but struggling with other parts!

Simon Pryce MBA CMgr FCMI
Director
Skylight Media
0115 958 6060 or 07970 504 293

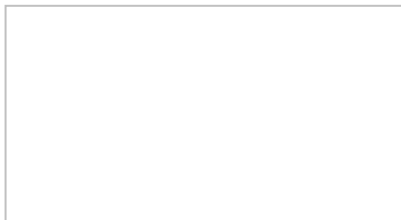
Sent from my mobile, so please forgive any typos!

On Fri, Jun 9, 2023, 07:10 Lisa Welton <lisa@retirement.capital> wrote:
Brilliant... Please send me a copy

Kind Regards,

Lisa

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On Thu, 8 Jun 2023 at 20:58, Simon Pryce <simon@skylightmedia.co.uk> wrote:
Hi Lisa,

Relief, as the pack has arrived this afternoon whilst I was out.

I'll complete the pack unless I need to send it to you.

Simon

Simon Pryce MBA CMgr FCMI
Director
Skylight Media
0115 958 6060 or 07970 504 293

Sent from my mobile, so please forgive any typos!

On Thu, Jun 8, 2023, 12:53 Lisa Welton <lisa@retirement.capital> wrote:

Morning Simon,

I am just following up on my below email to see if you have received the documents from Scottish Widows yet?

Kind Regards,

Lisa

On Thu, 1 Jun 2023 at 12:13, Lisa Welton <lisa@retirement.capital> wrote:

Good morning Simon,

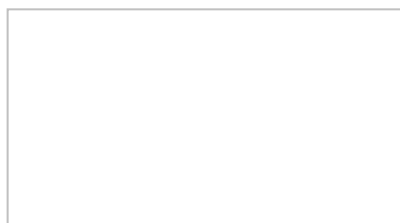
I have spoken with Scottish widows.. They received transfer pack. On the 25th May there was a letter issued to you by post and also on the 30th May... This is a questionnaire they have sent to you which needs to be completed and sent back to them.

Please when you receive this can you send me a copy of this.

Kind Regards,

Lisa

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On Tue, 23 May 2023 at 15:04, Simon Pryce <simon@skylightmedia.co.uk> wrote:
Hi Lisa,

Wonderful, thank you so much for your assistance in this.

I shall keep you posted when I receive anything.

Kind regards,

Simon

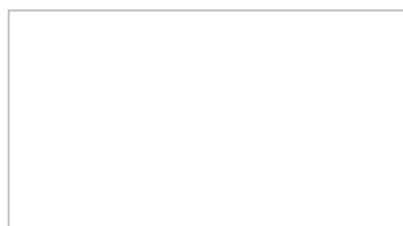
On Tue, May 23, 2023 at 2:01 PM Lisa Welton <lisa@retirement.capital> wrote:
Hi Simon,

All is now sent to them to start the ball rolling... Please look out for any correspondence from them and let me know when you receive anything from them. If nothing is heard within a week I will contact them to ensure they are processing the documents and preparing the transfer.

Kind Regards,

Lisa

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On Tue, 23 May 2023 at 14:51, <info@rcadministration.com> wrote:
Dear Transfers team

Client name : **Simon Pryce**
Pension Company Policy/Plan Number: **SW3390621**
NINo: **NM594636A**

Please find attached a completed application from Simon Pryce to transfer his pension out, together with the below listed documents these have also been posted to you:

1. Members discharge declaration
2. Receiving scheme discharge declaration
3. Trust Deed
4. Scheme Rules
5. HMRC Tax Registration Letter
6. HMRC Screen shot
7. SSAS Metro Bank details
8. SSAS Metro Bank statement
9. Company Employment Letter
10. Contribution Schedule Letter
11. Authority Letter
12. Members Guide
13. 3 months Payslips Feb, Mar Apr 2023
14. Feb 2023 Bank Personal Statement
15. March 2023 Bank Personal Statement
16. April 2023 Bank Personal Statement
17. Cover Letter

I would be most grateful if you may process Simon Pryce'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

1A Park Lane
Poynton
Cheshire
SK12 1RD

Company Number: 12409200

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12 attachments



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7K



F1A71C32FA9D4E88A3CA39ED1DC7CD9E[77063].jpg
3K



9026FF031C9E4581A2AD407D585AB62F[77064].jpg
3K



06. MetroBank De Payen SSAS.pdf
52K



04.PRYCE Company Employment Letter.pdf
278K



05. PRYCE Company Contributions Letter.pdf
193K



02. TRUST_DEED_v2_SP.pdf
772K



03. Scheme Rules 2023.pdf
134K



08. Pryce_Statement_Apr23.pdf
683K



09. Skylight Media Ltd - Employee Payslip for Feb Mar Apr-2023 for Simon Pryce.pdf
103K



07. Pryce_Statement_Mar23.pdf

704K



01. PRYCE_TransferOut_SW_Complete.pdf

10378K