

Transfer out - VG0407710 - Edward Brunt - Edward Brunt SSAS

To Vanguard.PensionAdmin@fnz.co.uk <vanguard.pensionadmin@fnz.co.uk> Copy
Personalinvestors@vanguard.co.uk <personalinvestors@vanguard.co.uk> •
edbrunt@actioncoach.co.uk <edbrunt@actioncoach.co.uk> Blind copy
Lisa@retirement.capital <lisa@retirement.capital>

Good morning Transfers team,

Client name: **Edward Brunt**
Pension Company Policy/Plan Number: **VG0407710**
NINO: **JH260270C**

Please find enclosed a completed application from Edward Brunt to transfer his pension out, together with the following documents:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Screen shot
5. HMRC Tax Registration Letter
6. Metro SSAS Bank Account Details
7. Metro SSAS Bank Statement
8. Authority Letter
9. Company contributions schedule letter
10. Company Employment Letter
11. Payslips (Mar, Apr & May 2023)
12. Personal Bank Statements (3 months)

I would be most grateful if you may process Edward Brunt'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

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.

- 00. Transfer Cover Letter - Edward Brunt - Vanguard.pdf (240 KB)
- 02. Edward Brunt SSAS - Trust Deed.pdf (870 KB)

- 04. HMRC Screenshot Edward Brunt SSAS - Managing pension schemes - GOV.UK.pdf (109 KB)
- 03. Scheme Rules.pdf (183 KB)
- 11. Payslips Mar Apr May 2023.pdf (53 KB)
- 09. Company Contributions schedule letter- Edward Brunt.pdf (636 KB)
- 08. Authority Letter - Edward Brunt - Vanguard.pdf (484 KB)
- 07. Metro Statement Edward Brunt SSAS.pdf (72 KB)
- 06. Metro Bank acc.pdf (245 KB)
- 05. Edward Brunt SSAS HMRC Registration12102022.pdf (855 KB)
- 13. Member Guide.pdf (754 KB)
- 12. Personal Bank Statements Transactions--161730-10020176--16-04-2023-16-05-2023.pdf (2 MB)
- 10. Company Employment letter -Edward Brunt.pdf (433 KB)
- 01. SIGNED Vanguard Transfer out form - Edward Brunt.pdf (1017 KB)