| **TRANSFER PACK - £350 - Includes:-** |  |
| --- | --- |
| Cover letter from RC Administration to former pension company – done |  |
| Completed Transfer Application form - supplied by previous pension provider – done |  |
| HMRC letter confirming tax registration of new SSAS - done |  |
| HMRC Screen shot - done |  |
| Trust Deed and Rules for new SSAS (including any subsequent deed/rules) – done |  |
| Bank Statement (new SSAS bank account) – done |  |
| ~~Bankers resolution~~ OR Metro account confirmation letter - done |  |
| 3 months payslips (from client) – done |  |
| Letter from Employer (from client) - done  Contributions Letter (from client) - done |  |
| ~~Letter from Accountant?? to query as not sure what this is for?~~ |  |
| TPR registration (if applicable) – done |  |
| ICO registration number (if applicable) – Galina working on |  |
| FCA registration number (if IFA used for transfer) - n/a |  |
| IFA details (if client has used IFA for transfer advise) – n/a |  |
| 1 call to former pension company to confirm receipt of documents |  |
| Completion of HMRC additional points letter (if required) |  |

Any further contact with the former pension company will be charged at £50 per hour. You will receive a report to show details of any contact with allocated times.