

Elevate
PO Box 6877
Basingstoke
RG24 4RT

15th August 2023

Client name: Kim Daly
Elevate Account number: EL1456187

To Whom it may concern,

Please find enclosed a completed application from Kim Daly to transfer her pension out, together with the following documents:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Tax Registration Letter
5. HMRC Screen shot
6. Company Contribution Schedule
7. Company Employment Letter
8. Personal Bank Statement May 2023
9. Personal Bank Statement June 2023
10. Personal Bank Statement July 2023
11. 3 months Payslips
12. P60 Year ending April 2022
13. Authority Letter
14. SSAS Metro Statement
15. SSAS Metro Bank account details
16. Members Guide

I would be most grateful if you may process Kim Daly's request at your earliest convenience. Should you require any further information, please do not hesitate to contact us.

Yours Sincerely



Lisa Welton
Scheme Administrator