

Individual Pension Transfers Out
Workplace DC Pensions
Legal & General Assurance Society Ltd
Brunel House
2 Fitzalan Road
Cardiff
CF24 0EB

06th September 2023

Client name: Kim Daly
Pension Company Policy/Plan Number: 2421737401WPL Legal & General Worksave pension plan

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. SafeGuidance appointment unique ref no. 211837/010923
17. 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