

Transfer out request - 2421737401 Kim Daly - FNK SSAS

To CorporatePensionClaims@landg.com <corporatepensionclaims@landg.com> Copy hi@kdaly.me • kim.daly1@googlemail.com Blind copy lisa@retirement.capital

Dear Pension Transfers Team,

Client name: **Kim Daly**

Pension Company Policy/Plan Number: **2421737401WPL Legal & General Worksave pension plan**

Please find attached a completed application from Kim Daly to transfer her pension out, together with the below listed documents. These have also been posted to you.

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. Safe Guidance appointment unique ref no. 211837/010923
17. Members Guide
18. Cover letter

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.

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.

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- 12. Kim Daly P60 Tax yr 2022.pdf (18 KB)
 - 13. Authority letter - L&G- Kim Daly.pdf (25 KB)
 - 06. Company Contributions Kim Daly.pdf (119 KB)
 - 07. Company Employment Letter - Kim Daly.pdf (107 KB)
 - 11. Payslips May Jun Jul 2023 - Kim Daly.pdf (97 KB)
 - 14. Metro FNK SSAS.pdf (76 KB)
 - 04. 22.6.21 HMRC Registration - FNK SSAS.pdf (1 MB)
 - 17. Member Guide.pdf (754 KB)
 - 02. FNK_SSAS_-_Trust_Deed.docx.pdf (611 KB)
 - 09. Statement 23-jun-23 ac 40018767.PDF (462 KB)
 - 01. Completed legal general transfer form.pdf (458 KB)
 - 10. Statement 24-jul-23 ac 40018767.PDF (451 KB)
 - 08. Statement 24-may-23 ac 40018767.PDF (459 KB)
 - 15. FNK SSAS- ACCOUNT CONFIRMATION.PDF (291 KB)
 - 05. HMRC Screenshots 06.09.23.pdf (260 KB)
 - 16. Retirement.Capital Mail - Fwd_ Your Pension Safeguarding guidance appointment summary.pdf (303 KB)
 - 00. Transfer Cover Letter - L&G Kim Daly FNK SSAS.pdf (199 KB)
 - 03. Scheme Rules.pdf (183 KB)