

Re: Transfer out - Policy 33915 Ian Henderson - Henderson-Maume SSAS

To info@rcadministration.com

Hi Lisa,

Hope you are well.

I've just had a call with Broadstone where I confirmed that I've not been coerced into transferring residual to SSAS. The chap mentioned it will now go to the board for a decision. (up to 2 weeks then 10 days to process). Seems to be a disparity between what I was told last week in terms of turnaround.

Thanks,

Ian.

On 9 Jun 2023, at 13:30, info@rcadministration.com wrote:

Dear Transfers team,

Client name : **Ian Henderson**
Pension Company Policy/Plan Number: **33915**
NINo: **JR359651D**

Please find attached, the updated completed Pension Transfer Out Form as requested.
This has also been send to you by post.

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.

On 08/06/2023 09:30 CEST info@rcadministration.com wrote:

Dear Transfers team,

Client name : **Ian Henderson**
Pension Company Policy/Plan Number: **33915**
NINo: **JR359651D**

Please find attached a completed application from Mr. Ian Henderson to transfer his 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 dated 8th June 2023
- 6. Metro SSAS Bank Statement
- 7. Metro SSAS Bank Account details
- 8. Authority Letter
- 9. Company Contribution Letter with Schedule
- 10. Company Employment Letter
- 11. 3 Months Payslips April, May, June 2023
- 12. Personal Bank statement (salary payments)
- 13. Drivers Licence
- 14. Utility bill
- 15. Members guide
- 16. Cover Letter

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

Kind regards,
Lisa Welton

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<01. Completed Henderson I - Transfer - Residual Transfer Letter[2062409]-1.pdf>