

Transfer out request -Nicola Steele - 41418735 - Nicola Steele Pension Scheme

To workplacesavings@scottishwidows.co.uk <workplacesavings@scottishwidows.co.uk> •
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nicolarsteele@gmail.com <nicolarsteele@gmail.com> Blind copy
lisa@retirement.capital <lisa@retirement.capital>

Good morning Transfers Team,

Client name: **Nicola Steele**
Pension Company Policy/Plan Number: **41418735**
NINO: **NZ644569A**

Please find attached the completed application from Nicola Steele to transfer her pension out, together with the following documents these have also been posted:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. Authority Letter
5. Company Employment Letter
6. Company Contributions Schedule letter
7. HMRC Tax Registration Letter
8. HMRC Screenshot
9. SSAS Bank account details
10. SSAS Bank Statement
11. Payslip (Annual)
12. Personal bank statements with income
13. Members Guide
14. Cover Letter

I would be most grateful if you may process Nicola Steele 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

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- 01. Signed Scottish widows Transfer out - Nicola Steele.pdf (450 KB)
- 02. Nicola Steele Pension Scheme - Trust Deed Signed.pdf (6 MB)
- 04. Scottish Widows Authority letter Nicola Steele.pdf (185 KB)
- 06. Company Contributions Letter - Nicola Steele.pdf (90 KB)
- 03. Scheme Rules - June 2022.pdf (183 KB)
- 05. Company Employment Letter Nicola Steele.pdf (104 KB)
- 11. Annual Payslip - Month Ending 31 March 2023.pdf (64 KB)
- 10. Metro Statement 11.05.23 Nicola Steele.pdf (71 KB)
- 09. SSAS Account detailes NICOLA STEELE MB.pdf (447 KB)
- 08. HMRC Screenshot Nicola Steele Pension Scheme - Managing pension schemes - GOV.UK.pdf (108 KB)
- 07. 23.1.11 HMRC Registration Notice - Nicola Steele Pension Scheme.pdf (1 MB)
- 00. Transfer Cover Letter - Scottish Widows - Nicola Steele.pdf (242 KB)
- 13. Member Guide.pdf (754 KB)
- 12. Nicola Steele Mar - April Bank statement.pdf (200 KB)