



Lisa Welton <lisa@retirement.capital>

Pension Transfer out - 0302937793/001 Susan Silngleton - Phoenix Life - Singleton Family SSAS

1 message

Lisa Welton <lisa@retirement.capital>

7 August 2023 at 11:01

To: Louise Davies <louise@retirement.capital>

Cc: Georgina Martin <georginam@retirement.capital>

Good morning Louise,

I hope this email finds you well. When you have a moment... please find attached the below listed documents. Please can you send them recorded post to the below address:

Phoenix Life
PO Box 1243
Peterborough PE2 2LD

1. Pension transfer out forms.
2. Trust Deed
3. Scheme Rules
4. HMRC Tax Registration Letter
5. HMRC Screen shot
6. TPR Registration Certificate
7. ICO Certificate
8. Company Contribution Schedule
9. Company Employment Letter
10. Personal Bank Statement Mar-Jun 2023
11. 3 months Payslips
12. Authority Letter
13. SSAS Metro Statement
14. SSAS Metro Bank account details
15. Members Guide
16. Cover letter

Thanks :)

Kind Regards,

Lisa

16 attachments**04. 21.7.21 HMRC Practitioner Authorisation - Singleton Family SSAS.pdf**
272K**05. 04.08.23 HMRC Print Out - Singleton Family SSAS.pdf**
151K**02. Signed - Trust Deed - 230517.pdf**
343K**03. Scheme Rules.pdf**
173K**01. Completed Phoenix pension transfer 0302937793 June 23.pdf**
1371K**07. ICO Registration Certificate to Sep 2023.pdf**
95K

**06. TPR Details 200723.pdf**

124K

**08. Company contributions letter Susan Singleton.pdf**

141K

**09. Company employment letter susan singleton.pdf**

67K

**12. Letter of authority Phoenix 0302937793001.pdf**

127K

**11. SLS payslips May- July 2023.pdf**

425K

**10. SLS bank statements May - July 2023.pdf**

955K

**13. Metro Bank SSAS Account Singleton family.pdf**

54K

**14. Metro Bank Account Details - Singleton Family SSAS.pdf**

214K

**15. Member Guide.pdf**

551K

**00. Transfer Cover Letter Phoenix Life - Susan Singleton.pdf**

175K