

Pension Transfer out request - Phoenix Life N02646L 000-000 Susan Singleton - Singleton Family SSAS

To clientservices@phoenix-services.info Copy sue@limbrook.co.uk Blind copy lisa@retirement.capital

Dear Transfers Team,

Client name: **Susan Singleton**

Pension Company Policy/Plan Number: **N02646L 000-000 NPLL PP Scheme No 1**

Please find attached a completed application from Susan Singleton 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. 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 on RC Administration headed paper
15. Members Guide
16. Cover letter

I would be most grateful if you may process Mrs. Singleton 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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- 13. Statement Singleton Family SSAS.pdf (73 KB)
 - 03. Scheme Rules.pdf (236 KB)
 - 14. Headed paper Letter Bank details - Susan Singleton.pdf (209 KB)
 - 05. 04.08.23 HMRC Print Out - Singleton Family SSAS.pdf (206 KB)
 - 08. Company contributions letter Susan Singleton.pdf (192 KB)
 - 12. Letter of authority Phoenix N02646L.pdf (178 KB)
 - 06. TPR Details 200723.pdf (169 KB)
 - 07. ICO Registration Certificate to Sep 2023.pdf (129 KB)
 - 09. Company employment letter susan singleton.pdf (91 KB)
 - 00. Transfer Cover Letter - Susan Singleton.pdf (240 KB)
 - 01. Completed Phoenix N02646L 000-000.pdf (1 MB)
 - 10. SLS bank statements May - July 2023.pdf (1 MB)
 - 15. Member Guide.pdf (754 KB)
 - 11. SLS payslips May- July 2023.pdf (581 KB)
 - 02. Signed - Trust Deed - 230517.pdf (469 KB)
 - 04. 21.7.21 HMRC Practitioner Authorisation - Singleton Family SSAS.pdf (371 KB)