

Prudential Pension transfer out request - RET166701 Keith Pickstone - The Stones Group SSAS

To generalservicing.pruwealth@prudential.co.uk Copy keithpickstone@gmail.com Blind copy
lisa@retirement.capital

Dear Transfers Team,

Client name: **Keith Pickstone**

Pension Company Policy/Plan Number: **RET166701 (RET166701A01 / RET166701D01 / RET166701D02)**

Please find attached a completed application from Keith Pickstone to transfer his pension out, into a SSAS called 'The Stones Group SSAS', together with the below listed documents:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Tax Registration Letter
5. HMRC Screen shot (dated 2 November 2023)
6. TPR Registration Certificate
7. ICO Certificate
8. Company Contribution Schedule
9. Company Employment Letter
10. Personal Bank Statement Aug Sep Oct 2023
11. 3 months Payslips
12. Authority Letter
13. SSAS Metro Statement
14. SSAS Metro Bank account details
15. Members Guided
16. Cover letter

I would be most grateful if you may process Keith Pickstone'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.

-
- 02. Trust Deed.pdf (837 KB)
 - 01. Completed - Pru - Keith Pickstone.pdf (1 MB)
 - 03. Scheme Rules.pdf (183 KB)
 - 04. HMRC Registration Letter.pdf (1 MB)
 - 06. TPR registration_The Stones Group SSAS.pdf (149 KB)
 - 05. HMRC Screenshot 02.11.2023 The Stones Group SSAS - Managing pension schemes - GOV.UK.pdf (352 KB)
 - 08. Maxus Properties Ltd - SSAS Scheme contributions - signed.pdf (95 KB)
 - 07. Registration Certificate - ZB617110.pdf (250 KB)
 - 10. Halifax Bank Statement-Aug Sept Oct -2023.pdf (47 KB)
 - 09. Maxus properties - Confirmation of sponsoring employer of Keith Pickstone - signed.pdf (254 KB)
 - 12. SSAS scheme - Pru Letter of authority - signed.pdf (190 KB)
 - 11. Keith Pickstone - Payslip - Aug Sep Oct 2023.pdf (543 KB)
 - 13. SSAS Statement The stones group SSAS.pdf (73 KB)
 - 15. Member Guide.pdf (754 KB)
 - 14. Metro THE STONES GROUP SSAS - Welcome Letter.pdf (866 KB)
 - 00. Transfer Cover Letter - Prudential - Kieth Pickstone.pdf (236 KB)