**SSAS Dept
Rowanmoor**

**Rowanmoor House**

**46-50 Castle Street**

**Salisbury**

**SP1 3TS**

Dear Sirs

Toby Maisie Limited Executive Pension Scheme 1B/0512

We have been provided with a letter of authority to obtain information regarding the above named scheme.

I enclose the letter of authority duly signed.

Would you please return this to us, with the information documents stated below by email to data@retirement.capital.

Please could you provide us with the following information:

All Deeds & Scheme Rules / Letters of Resignation / Death Certificates / Letters of Announcement

Details of all Transfers In and Out, to include any Annuity Purchases

That the scheme is not subject to a de-registration notice and provide a copy of the HMRC approval letter and a screen print of the current scheme details from HMRC online dated within the last 3 months.

A list of all the assets of the scheme and a copy of the most recent valuation(s)

A copy of the last 6 months’ bank statements

Where there is property, please provide a copy of the lease and confirmation that any rental payments are up to date.

Where there is loan, please provide a copy of the loan documentation along with the loan repayment schedule and confirmation that all loan repayments are up date.

Copy of the last Annual Review

Confirmation as to whether any LTA / BCE have taken place and whether or not the client holds any LA protection.

Finally, please advise us if in your professional opinion there are any reasons why we should not be taking over the administration of this Pension Scheme.

If you are unable to email this information, please post this information to us at our processing centre.

Thank you for your assistance

Yours sincerely

Lisa Welton
**For Retirement Capital**