

Ref: ROBINSON05072022-VP

Whitehall Group (UK) Limited

Imperial House
Hornby Street
Bury
BL9 5BN

t: 03302 232 300

e: enquiries@whitehallgroup.co.uk

www.whitehallgroup.co.uk

Retirement Capital
Office 12 Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

5th July 2022

Dear Sirs,

Robinson Family SSAS

I enclose a letter of appointment signed by the Trustees of the above pension scheme confirming that we have been asked to take over as Administrators of this scheme. Our Trustee company, Whitehall Trustees Limited will be appointed as Professional Trustee.

Please let us know whether there is any professional or other reason why we should not accept this appointment.

Please also let us have the following copy documentation and information which we require to complete our records:

1. A copy of the establishing trust deed.
2. A copy of the current governing Trust Deed.
3. The scheme establishment date.
4. A list of all assets including account/policy numbers and the latest valuation.
5. A copy of all bank statements from the last Pension Scheme Return date.
6. Has the PSR as at 05.04.2022 been submitted to HMRC?
7. A copy of the most recent Expression of Wishes form for the member
8. Details of the latest fund split you hold on file.
9. Contribution and transfer history for each member.
10. A copy of any loan agreements, legal charge and valuation of the security, if applicable.
11. Details of any pension protection for the members and copy certificate(s)
12. Full details of the retirement benefits paid from the pension scheme:
 - Fund vested
 - Date vested
 - TFC taken
 - Pension date
 - Percentage of LTA vested
 - Max GAD pension
 - Next review date
 - Annual pension figure for the current payment year
 - Frequency of pension payments
 - Member's tax code
 - Your (the scheme's) PAYE reference

- Same information for each tranche if in phased retirement
- If phased drawdown, the split of the fund between crystallised and uncrystallised
- Details of Flexi-Access Drawdown if applicable

13. The HMRC Registered Scheme number

14. Details of the scheme's Information Commissioner reference

15. Details of the Pensions Regulator scheme number

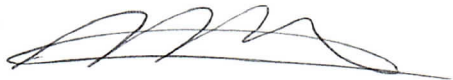
16. The scheme's Legal Entity Identifier (LEI) and LEI renewal date

If you are registered as Scheme Administrator, would you please associate us on HMRC Online. Our Scheme Administrator ID is A0112834. If not, would you please confirm who is the registered Scheme Administrator.

If you have any questions, please contact me.

I look forward to hearing from you.

Yours faithfully



Vanessa Peters

Whitehall Group (UK) Limited

vanessa.peters@whitehallgroup.co.uk

Date: 7th day of JUNE 2022

Retirement Capital
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

Dear Sirs,

Robinson Family SSAS

We have appointed Whitehall Group (UK) Limited as Scheme Administrator of the above pension scheme. Whitehall Trustees Limited have also been appointed as Professional Trustee.

This letter consents and authorises you to provide them with any information or documentation including personal data they may require to the following address:

Whitehall Group (UK) Limited
Imperial House
Hornby Street
Bury
BL9 5BN

Please arrange to appoint Whitehall Trustees Limited as Scheme Administrator on HMRC Online. Their Scheme Administrator ID is **A0112834**.

Many thanks,

Yours faithfully,

Director/Trustee


Julia Robinson

Director/Trustee

Director/Trustee