Dear Sirs,

**Policy Number: XXX**

**Plan Holder: XXX**

**NI: XXXX**

Please find attached a fully completed and signed Transfer Out Form on behalf of Client Name requesting a transfer of the above policy to a SSAS called SSAS NAME which has also been posted to you.

I attach a number of items to support this application as requested which have been listed below for your convenience:

1. Pension Transfer Out Form

2. Trust Deed

3. Scheme Rules

4. HMRC Screen shot

5. HMRC Tax Registration Letter

6. Authority Letter

7. Company Employment letter

8. Company Contributions Letter

9. TPR Registration

10. Payslips Dec 22, Jan 23, Feb 23

11. Personal Bank Statements Jan, Feb, Mar 23

12. Metro Bank Statement SSAS account

13. Metro Bank SSAS account opening letter

14.Members Guide

Additionally, you may find Transfer Cover letter to support our transfer out application.

I would be most grateful if you may process Client Name request at your earliest convenience.

Should you have any queries or require any additional information, please notify me accordingly.

Kind regards,

Lisa Welton