

TRANSFER PACK - £350 - Includes:

- Cover letter from RC Administration to former pension company
- Completed Transfer Application form - supplied by previous pension provider
- Letter of Authority (drafted by us signed by client)
- HMRC letter confirming tax registration of new SSAS (supplied by us)
- HMRC Screen shot (supplied by us)
- Trust Deed (supplied by us)
- Scheme Rules for SSAS (including any subsequent deed/rules, supplied by us)
- Bank Statement (SSAS bank account supplied by us)
- Bankers resolution or Metro confirmation letter (supplied by us)
- 3 months payslips (supplied by client)
- Letter from Employer (drafted by us signed by client)
- Contributions Letter (drafted by us signed by client)
- TPR registration (if applicable, supplied by us)
- ICO registration number (if applicable, supplied by us)
- FCA registration number (if applicable)
- IFA details (if client has used IFA for transfer advise)
- 1 call to former pension company to confirm receipt of documents Completion of HMRC additional points letter (if required)

Any further contact with the former pension company will be charged at £75 per hour. You will receive a report to show details of any contact with allocated times.