

TP Transfer out request - P0755-33498-00314 William Holdsworth - Bill Holdsworth SSAS

To transfersout@tpllp.com Copy LisaOldroyd@tpllp.com <lisaoldroyd@tpllp.com> •
bill.holdsworth@jamesholdsworth.com Blind copy lisa@retirement.capital

Dear Pensions Transfers Team,

Client name : **William Holdsworth**
Pension Company Policy/Plan Number: **P0755-33498-00314**
Plan Number: **45835336R**

Please find attached a completed application from William Holdsworth to transfer his pension out, together with the below listed documents. These have also been posted to you.

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Tax Registration Letter
5. HMRC Screen shot
6. Company Contribution Schedule
7. Company Employment Letter
8. Personal Bank Statement May, Jun, Jul 2023
9. 3 months company Pay Schedule May, Jun, Jul 2023
10. Authority Letter
11. SSAS Metro Statement
12. SSAS Metro Bank account details
13. Members Guide
14. Cover Letter

I would be most grateful if you may process Mr Holdsworth'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

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- 11. Bill Holdsworth SSAS Statement .pdf (71 KB)
 - 13. Member Guide.pdf (754 KB)
 - 09. Pay schedule May Jun Jul 2023.pdf (707 KB)
 - 06. Company Contributions Letter - Bill Holdsworth.pdf (641 KB)
 - 12. Account details.pdf (547 KB)
 - 01. Completed True Potential Transfer Form - W Holdsworth.pdf (552 KB)
 - 07. Company Employment Letter - Bill Holdsworth.pdf (299 KB)
 - 05. HMRC Screenshot 05.09.23 Bill Holdsworth SSAS - Managing pension schemes - GOV.UK.pdf (261 KB)
 - 10. Authority Letter - Bill Holdsworth - TP.pdf (259 KB)
 - 00. Transfer Cover Letter - Bill Holdsworth.pdf (241 KB)
 - 03. Scheme Rules.pdf (183 KB)
 - 02. Bill Holdsworth Signed Deed.pdf (1 MB)
 - 04. HMRC Registration.pdf (1 MB)
 - 08. Personal Bank statements May Jun Jul.pdf (1 MB)