Scottish Widows

69 Morrison Street

Edinburgh

EH3 lHL

6th September 2023

Client name: **Philip Budd**

Pension Company Policy/Plan Number: **C03EDE9**

To Whom it may concern,

Please find enclosed a completed application from Philip Budd to transfer his pension out to a SSAS called ‘Budd Family Pension Scheme’, together with the following documents:

1. Pension Transfer Out Form
2. Trust Deed & Scheme Rules
3. HMRC Tax Registration Letter
4. HMRC Screen shot
5. TPR Registration Certificate
6. ICO Certificate
7. Company Contribution Schedule
8. Company Employment Letter
9. Personal Bank Statement Mar-Jun 2023
10. 3 months Payslips
11. P60 2022 - 2023
12. Authority Letter
13. SSAS Bank Statement
14. Members Guide

I would be most grateful if you may process Philip Budd’s request at your earliest convenience. Should you require any further information, please do not hesitate to contact us.

Yours Sincerely

Close-up of a signature

Description automatically generated

Lisa Welton

Scheme Administrator