Scottish Widows

69 Morrison Street

Edinburgh

EH3 lHL

6th September 2023

Client name: **Philip Budd**

Pension Company Policy/Plan Number: **80310327 & 6317789**

To Whom it may concern,

Please find enclosed completed applications 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 x2 (**80310327 & 6317789)**
2. Trust Deed & Scheme Rules
3. HMRC Tax Registration Letter
4. HMRC Screen shot (21 February 2025)
5. TPR Registration Certificate
6. ICO Certificate
7. Company Contribution Schedule
8. Company Employment Letter
9. Personal Bank Statement Dec Jan Feb 2025
10. 3 months Payslips Dec Jan Feb 2025
11. Authority Letter
12. SSAS Bank Statement
13. 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



Lisa Welton

Scheme Administrator