

Aegon Pension Transfer out request - Acc 20862854 Plan 71341337

Andrew Jannetta - HMF Investment Trust SSAS

To my.pension@aegon.co.uk • referrals@aegon.co.uk • transfersout@aegon.co.uk Copy
andrew@hmfconsultancy.co.uk Blind copy lisa@retirement.capital

Dear Pensions Transfer Team,

Client name: **Andrew Jannetta**

Retiree Account number : **20862854**

Retiree Pension plan number : **71341337**

Please find attached a completed application from Andrew Jannetta 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. 3 Months Personal Bank Statement Jun Jul Aug 2023
9. 3 Months Payslips Jun Jul Aug 2023
10. Authority Letter
11. SSAS Metro Statement
12. SSAS Metro Bank account details
13. Passport copy
14. Members Guide
15. Cover Letter

I would be most grateful if you may process Mr. Jannetta'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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- 09. Payslips Jun Jul Aug 2023.pdf (59 KB)
 - 11. Metro Bank SSAS HMF Investment Trust SSAS.pdf (72 KB)
 - 08. Statement Jun jul Aug_2023.pdf (80 KB)
 - 06. Contribution letter.pdf (76 KB)
 - 12. Metro bank HMF INVESTMENT TRUST SSAS.pdf (540 KB)
 - 01. Aegon transfer out form.pdf (533 KB)
 - 07. Company Employment Letter.pdf (487 KB)
 - 10. Aegon authority letter.pdf (471 KB)
 - 00. Transfer Cover Letter - Aegon - Andrew Jannetta.pdf (239 KB)
 - 05. HMRC Screenshot 01.09.23 HMF Investment Trust SSAS - Managing pension schemes - GOV.UK.pdf (182 KB)
 - 03. Scheme Rules.pdf (183 KB)
 - 13. Jannetta, Andrew - Certified Passport.pdf (2 MB)
 - 04. HMRC Registration.pdf (1 MB)
 - 02. Trust Deed.pdf (1 MB)
 - 14. Member Guide.pdf (754 KB)