

L&G Transfer out request - 2282443401 Andrew Jannetta - HMF Investment Trust SSAS

To grouptransfersout@landg.com Copy andrew@hmfconsultancy.co.uk Blind copy lisa@retirement.capital

Dear Pension Transfers Team,

Client name: **Andrew Jannetta**

Pension Company Policy/Plan Number: **2282443401**

Scheme Name: **WPL_Legal & General Worksave Pension Scheme E 3**

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. Members Guide
14. 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

IMPORTANT - PLEASE NOTE The information transmitted is intended only for the person or entity to which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of or taking of any action in reliance upon this information by persons or entities other than the intended recipient is prohibited. If you received this in error please contact the sender and destroy this email.

- 10. L&G authority letter.pdf (30 KB)
- 09. Statement Jun jul Aug_2023.pdf (80 KB)

- 06. Contribution letter.pdf (76 KB)
- 08. Payslips Jun Jul Aug 2023.pdf (59 KB)
- 11. Metro Bank SSAS HMF Investment Trust SSAS.pdf (72 KB)
- 04. HMRC Registration.pdf (1 MB)
- 02. Trust Deed.pdf (1 MB)
- 01. L&G transfer out form.pdf (950 KB)
- 13. Member Guide.pdf (754 KB)
- 12. Metro bank HMF INVESTMENT TRUST SSAS.pdf (540 KB)
- 07. Company Employment Letter.pdf (487 KB)
- 00. Transfer Cover Letter - Legal & General - Andrew Jannetta.pdf (242 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)