

## LifeSight Transfer out - Mrs J Sarmad - Ref No: 0080230 - JH&H Pension Trust SSAS

To lifesightsupport@willistowerswatson.com <lifesightsupport@willistowerswatson.com> Blind copy  
lisa@retirement.capital <lisa@retirement.capital>

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Dear Lifesite Transfers Team,

Please find attached the below listed documents, requested in your letter dated 9th June.

1. Member out consent form - Completed signed
2. Extra information form - Completed signed
3. HMRC registration
4. HMRC screenshot (dated 22.06.23 today)
5. Your letter of request dated 9th June

If you require any further information please do not hesitate to contact me back.

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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On 22/05/2023 09:00 CEST [info@rcadministration.com](mailto:info@rcadministration.com) wrote:

----- Original Message -----

From: LifeSight Pensions Team <[lifesightsupport@willistowerswatson.com](mailto:lifesightsupport@willistowerswatson.com)>

To: [info@rcadministration.com](mailto:info@rcadministration.com)

CC: [javaria.sarmad@lmjaccountants.co.uk](mailto:javaria.sarmad@lmjaccountants.co.uk)

Date: 19/05/2023 19:05 CEST

Subject: LifeSight - Mrs J Sarmad - Ref No: 0080230

Dear Sirs

Thank you for your email below in respect of Mrs Sarmad's benefits.

Mrs Sarmad has asked to transfer her pension benefits to JH&H Pension Trust SSAS.

As administrators, we follow a standard procedure to mitigate the risk of pension liberation based on the principles of the published guidance from The Pensions Regulator (TPR) on combating pension scams.

Part of this procedure requires us to ask HM Revenue & Customs (HMRC) to confirm the registration status of JH&H Pension Trust SSAS before proceeding with the transfer.

Confirmation of the receiving plan's HMRC registration status needs to be checked, even if we have previously paid a transfer payment to JH&H Pension Trust SSAS as this status is not permanent and can be revoked by HMRC at any time if the plan no longer meets the requirements for registration.

Previous experience has shown that HMRC can take between two weeks and three months to respond. We will regularly follow-up on this enquiry with HMRC until the confirmation has been received.

If you have any questions, please contact us.

All the best,

**The LifeSight Team**



PO Box 758 | Redhill | Surrey | RH1 9GT

Phone: 01737 227 553

Email: [lifesightsupport@willistowerswatson.com](mailto:lifesightsupport@willistowerswatson.com)  
[www.LifeSight-epa.com](http://www.LifeSight-epa.com)

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**From:** [info@rcadministration.com](mailto:info@rcadministration.com) <[info@rcadministration.com](mailto:info@rcadministration.com)>

**Sent:** 17 May 2023 5:49 PM

**To:** LifeSight <[LifeSight@willistowerswatson.com](mailto:LifeSight@willistowerswatson.com)>; LifeSight Pensions Team  
<[lifesightsupport@willistowerswatson.com](mailto:lifesightsupport@willistowerswatson.com)>

**Cc:** [javaria.sarmad@lmjaccountants.co.uk](mailto:javaria.sarmad@lmjaccountants.co.uk)

**Subject:** Pension Transfer out - LifeSight-Santander Plan - 0080230 - Javaria Sarmad - JH and H Pension Trust SSAS

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Dear Transfer team,

Client name: **Javaria Sarmad**

Member No: **0080230**

Plan Name: **LifeSight - Santander Plan**

NINO: **(REMOVED)**

Please find enclosed a completed application from Javaria Sarmad to transfer her pension out, together with the following documents which have also been posted to you:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Screen shot
5. HMRC Tax Registration Letter
6. Metro Bank SSAS Account details
7. Metro Bank SSAS Statement
8. Authority Letter
9. Company contributions schedule Letter
10. Company Employment Letter
11. PaySlips Jan, Feb & Mar 2023
12. Personal Bank Statements Jan-Apr 2023
13. Members Guide

I would be most grateful if you may process Javaria Sarmad's request at your earliest convenience. Should you require any further information, please do not hesitate to contact me.

Kind regards,  
Lisa Welton

RC Administration Limited

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Kind regards

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- E14357809.pdf (124 KB)
  - 03. 23.3.17 HMRC Registration - JH&H Pension Trust SSAS.pdf (1 MB)
  - 02. Extra information Signed SKM\_C250i23061519450.pdf (360 KB)
  - 01. Completed Member out consent form LifeSight - Mrs Sarmad 0080230.pdf (461 KB)
  - 04. HMRC Screenshot 22.06.23 JH&H Pension Trust SSAS - Managing pension schemes - GOV.pdf (108 KB)
  - image001.png (7 KB)