



Telephone: **0800 634 4862** Fax: 020 8711 2522 Email: info@pensionpractitioner.com www.pensionpractitioner.com

Chris Holyoak
Technical Manager
Brooklands Pensions
Floor 3, Building 4
PO Box 345804
Dubai Outsource Zone
Dubai, UAE

4th December 2013

Dear Chris,

Re: Mersey 55 Retirement Scheme

Member: Steven Paul Robinson
Date of birth: 23rd January 1961
National Insurance Number: WL735683D
Brooklands SIPP Reference Number: 2341

Member: Tracy Joan Howard
Date of birth: 17th May 1967
National Insurance Number: NP024822A
Brooklands SIPP Reference Number: 2463

Member: Scott Clayton Nelson
Date of birth: 5th January 1967
National Insurance Number: NM705813A
Brooklands SIPP Reference Number: 2598

Member: Philip Franklin
Date of birth: 24th February 1961
National Insurance Number: WL280253D
Brooklands SIPP Reference Number: 76363684

Member: Peter David Dalton
Date of birth: 30th June 1962
National Insurance Number: WM721703C

Member: Nigel Simms
Date of birth: 6th April 1963
National Insurance Number: NA982661A
Brooklands SIPP Reference Number: 2471

Member: Jean Francis Jones
Date of birth: 22nd September 1956
National Insurance Number: YX956555C

Member: Gary Arthur Pensom
Date of birth: 23rd October 2013
National Insurance Number: NA738151C
Brooklands SIPP Reference Number: 2501

Referring to the information you requested in your email dated 3rd December 2013 please find attached a certified copy of the Trust Deed, Scheme Rules, SSAS Invitation Letter and The Pensions Regulator Registration Certificate.

The company is trading in panic alarms for the elderly.

The companies registered address for Mersey 55 Limited is 93 Aldwick Road, Bognor Regis, West Sussex, PO21 2NW.

The members are not employed by the sponsoring employer, they are Shareholders.

The sponsoring employer will not be making contributions to the scheme, although the Sponsoring Employer is able to do so if required.

The Trustees will be appointing Rathbones Wealth Investment Managers to have them direct the Investments.

You will find in the SSAS Invitation Letter all the information you need to know regarding how the benefits will be treated going forward.

The transfer payment should be made by BACS to the following account details:-

Name of Bank: Church House Trust
Account Name: Mersey 55 Retirement Scheme
Account Number: 33130274
Sort Code: 60-95-31
Reference: 3301302748

We have no further requirements in order for us to formally take over the ownership of the transfers.

If you require any further documentation to be completed in order that the transfer can be concluded, please advise me accordingly.

Please acknowledge safe receipt and that the documentation is all in order.

Thank you for your assistance in this matter.

Yours sincerely,

A handwritten signature in dark ink, appearing to read 'Michelle Lunnon', with a long horizontal line extending to the right.

Michelle Lunnon
For Pension Practitioner. Com

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