

Director **David Nicklin** Cert PFS Cert CII (MP) Company Number: **12409200**

Scottish Widows Retirement Account Team PO Box 24169 69 Morrison Street EDINBURGH EH31HH

17th May 2023

Client name: Nicola Steele Pension Company Policy/Plan Number: 41418735

To Whom it may concern,

Please find enclosed a completed application from Nicola Steele to transfer her pension out, together with the following documents:

- 1. Pension Transfer Out Form
- 2. Trust Deed
- 3. Scheme Rules
- 4. Authority Letter
- 5. Company Employment Letter
- 6. Company Contributions Schedule letter
- 7. HMRC Tax Registration Letter
- 8. HMRC Screenshot
- 9. SSAS Bank account details
- 10. SSAS Bank Statement
- 11. Payslip (Annual)
- 12. Personal bank statements
- 13. Members Guide

I would be most grateful if you may process Nicola Steele request at your earliest convenience. Should you require any further information, please do not hesitate to contact us.

Yours Sincerely

Lisa Welton Scheme Administrator

SSAS Pension Scheme Administrator Address: 1A Park Lane, Poynton Cheshire, SK12 1RD Certificate Member of the Chartered Insurance Institute Life and Pensions Faculty Email: info@rcadministration.com Telephone: 0330 311 0839