

## Re: Transfer out request -Nicola Steele - 41418735 - Nicola Steele Pension Scheme

To workplacesavings@scottishwidows.co.uk <workplacesavings@scottishwidows.co.uk> •  
retirementaccountclaims@scottishwidows.co.uk <retirementaccountclaims@scottishwidows.co.uk> •  
transfersoutroservicing@scottishwidows.co.uk <transfersoutroservicing@scottishwidows.co.uk> Copy  
nicolarsteele@gmail.com <nicolarsteele@gmail.com> Blind copy  
lisa@retirement.capital <lisa@retirement.capital>

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Good morning Transfers Team

Client name: **Nicola Steele**  
Pension Company Policy/Plan Number: **41418735**  
NINO: **NZ644569A**

Please find attached the signed Declaration form for Nicola Steele to transfer her pension out along with a cover letter. These documents have also been sent to you by post.

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.

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.

On 17/05/2023 09:58 CEST [info@rcadministration.com](mailto:info@rcadministration.com) wrote:

Good morning Transfers Team,

Client name: **Nicola Steele**  
Pension Company Policy/Plan Number: **41418735**  
NINO: **NZ644569A**

Please find attached the completed application from Nicola Steele to transfer her pension out, together with the following documents these have also been posted:

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 with income
13. Members Guide
14. Cover Letter

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.

Kind regards,  
Lisa Welton

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- 01. Signed Declaration Nicola Steele - Scottish Widows.pdf (478 KB)
  - 00. Transfer Cover Letter - Scottish Widows - Nicola Steele.pdf (450 KB)