

## Re: Pension Transfer out - U167557 / UP2156585 Susan Singleton - Singleton Family SSAS

To customers@reassure.co.uk Copy sue@limbrook.co.uk

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Dear Transfers team,

Client name: **Susan Singleton**

Pension Company Policy/Plan Number: **U167557 / UP2156585**

Please find attached the below listed documents

1. Completed money helper appointment confirmation.
2. You letter requesting the money helper appointment

I would be most grateful if you may process Mrs. Singleton'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.

On 15/09/2023 09:42 BST [info@rcadministration.com](mailto:info@rcadministration.com) wrote:

Dear transfers team,

Client name: **Susan Singleton**

Pension Company Policy/Plan Number: **U167557 / UP2156585**

I have just spoken to Rajni on the telephone. She advises she can not yet see the questionnaire in your system which the member has advised she sent back to you on the 30th August.

Please find attached a copy of the questionnaire she has sent to you.

Please can you provide and update on these cases once you have reviewed the document.

Kind regards

Lisa Welton  
RC Administration Limited

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On 07/08/2023 09:02 BST [info@rcadministration.com](mailto:info@rcadministration.com) wrote:

Dear Transfers team,

Client name: **Susan Singleton**

Pension Company Policy/Plan Number: **U167557 / UP2156585**

Please find attached a completed application from Susan Singleton to transfer her pensions out, together with the below listed documents, these have also been posted to you.

1. Pension Transfer release Form policy UP2156585
2. Pension Transfer release Form policy U167557
3. Trust Deed
4. Scheme Rules
5. HMRC Tax Registration Letter
6. HMRC Screen shot
7. TPR Registration Certificate
8. ICO Certificate
9. Company Contribution Schedule
10. Company Employment Letter
11. Personal Bank Statement Mar-Jun 2023
12. 3 months Payslips
13. Authority Letter
14. SSAS Metro Statement
15. SSAS Metro Bank account details
16. Members Guide

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Kind regards  
Lisa Welton

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- Retirement.Capital Mail - FW\_ Your Pension Wise appointment summary.pdf (160 KB)
  - U167557 Transfer R.pdf (17 KB)