

info@rcadministration.com

6/2/2023 13:30

Thomas Janion Transfer Out Request

To LisaOldroyd@tpllp.com <lisaoldroyd@tpllp.com>

Hi Lisa,

I hope you are well.

Please find attached the documents required for the transfer of Tom's policy to Trek Group Pension Scheme.

I have listed all the attachments below for your convenience.

- completed and signed transfer form
- acceptance letter from the receiving scheme's administrator
- HMRC certificate showing the PSTR number for the scheme
- scheme bank account statement as evidence of the account details and also contributions paid into the scheme by the company
- letter from the company confirming employment
- letter from the company confirming contributions
- last 3 payslips
- Certified ID
- Please note that the receiving scheme has only one member and does not require to be registered with the Pensions Regulator
- The scheme administrator of the receiving scheme is not registered with FCA as this is not required. We are registered with HMRC.

Please note that we have not completed point 8 and 9 of the application (advisor details). Is this something that is to remain blank or would Mark sign it?

If you require anything else from us, please let us know.

Kind regards
Georgina Martin

RC Administration Limited

Phone: 0330 311 0839

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Company Number: 12409200

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- True Potential Pension Transfer Out Form (Advised Clients).pdf (2 MB)
- RC Administration Ltd - Confirmation Letter 010223.pdf (299 KB)
- 22.3.3 HMRC Registration Notice - Trek Group Pension Scheme.pdf (1 MB)
- MB Statement - Trek Group Pension Scheme.pdf (71 KB)
- Company Letter - Tom Janion_.pdf (71 KB)
- Trek Group Pension Scheme.pdf (76 KB)
- Payslip for Tax Month_8, Tax Year_2022-2023.pdf (9 KB)
- Payslip for Tax Month_9, Tax Year_2022-2023.pdf (9 KB)
- Payslip for Tax Month_10, Tax Year_2022-2023.pdf (9 KB)
- Janion, Thomas - Certified ID.pdf (971 KB)