



Esther Salmon <esther@retirement.capital>

Re: Transfer to Whiterock Ventures Ltd Pension Scheme

1 message

Esther Salmon <esther@retirement.capital>
To: Stewart Grant <Stewart.Grant@bwsipp.co.uk>
Cc: The Investor SIPP <TheInvestorSIPP@barnett-waddingham.co.uk>

27 July 2020 at 15:21

Dear Stewart,

Many thanks for your email.

Please find detailed below and attached the information requested:

Can you confirm that RC Administration are the Administrator to the Whiterock Ventures Ltd Pension Scheme.
YES, PLEASE SEE ATTACHED HMRC SCREEN SHOT.

- Can you confirm if there have been any subsequent Deeds to the original Trust Deed dated the 13 January 2020, for example a Deed of Appointment. **THERE HAVE BEEN NO AMENDMENTS.**
- Can you provide me with a copy of an HMRC screenprint dated this month from the HMRC Scheme Administrator website showing the PSTR number for the SSAS and the date the PSTR was approved. **YES, PLEASE SEE ATTACHED HMRC SCREEN SHOT.**
- Can you provide evidence that the Trustees of the Whiterock Ventures Ltd Pension Scheme are registered with the Information Commissioner's Office as Data Controllers. - **THE SCHEME IS ONLY ONE MEMBER, ICO REGISTRATION IS NOT REQUIRED.**

I'm also making you aware that the attachment we received also included a copy of a letter regarding a separate pension scheme not connected to this member (I M Pask SSAS Pension). **THANK YOU AND SORRY, THE ATTACHMENT SENT TO YOU FOR SOME REASON INCLUDED ANOTHER LETTER, THANK YOU FOR POINTING THIS OUT.**

Kind Regards

Esther Salmon
Administrator

Retirement
.Capital



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On Wed, 22 Jul 2020 at 11:43, Stewart Grant <Stewart.Grant@bwsipp.co.uk> wrote:

Dear Esther,

I have received a request to arrange a partial transfer to the above pension scheme from our client David Irvings SIPP with Interactive Investors, our reference being 0961750.

I am currently reviewing the information provided and I would be grateful if you could provide me/ confirm the following:

- Can you confirm that RC Administration are the Administrator to the Whiterock Ventures Ltd Pension Scheme.
- Can you confirm if there have been any subsequent Deeds to the original Trust Deed dated the 13 January 2020, for example a Deed of Appointment.
- Can you provide me with a copy of an HMRC screenprint dated this month from the HMRC Scheme Administrator website showing the PSTR number for the SSAS and the date the PSTR was approved.
- Can you provide evidence that the Trustees of the Whiterock Ventures Ltd Pension Scheme are registered with the Information Commissioner's Office as Data Controllers.

I'm also making you aware that the attachment we received also included a copy of a letter regarding a separate pension scheme not connected to this member (I M Pask SSAS Pension).

I look forward to hearing from you.

Regards

Stewart Grant

Client Manager | BW SIPP LLP



Office Glasgow

Call 0141 243 4431

Web @bw_llp | barnett-waddingham.co.uk

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2 attachments

 **Pension scheme summary - Managing pension schemes - GOV.UK.pdf**
75K

 **HMRC - Registration Letter 15.05.20.pdf**
1224K