



Retirement Account  
PO Box 24169  
69 Morrison Street  
EDINBURGH  
EH3 1HH

Registered Scheme Administrator Limited  
Office 12, Venture Wales Building  
Petreback  
Merthyr Tydfil  
CF48 4DR

Customer Telephone: 03457 466 733  
[www.scottishwidows.co.uk](http://www.scottishwidows.co.uk)

25 October 2023

Dear Sir / Madam

### **Scottish Widows Retirement Account – 41785069**

We have received a request from you, to transfer the above Retirement Account to Carlton James Retirement Fund.

In order to proceed and to assist us with our review we require the following company documents:

- 1) The scheme Trust Deed and Rules
- 2) A screen print taken from the HMRC portal. This must be clearly dated within the last 30 days

Please return the outstanding to the above address at your earliest convenience, so that we may proceed with our review.

If you have any questions please call us on 03457 166 733. We may record and monitor your call to help us improve our service.

Yours sincerely

*David Kerr*

David Kerr  
Customer Advisor  
Retirements Front and Back Office