



Esther Salmon <esther@retirement.capital>

RE: New Account Set Up

1 message

Paul Brewington <Paul.Brewington@metrobank.plc.uk>

19 March 2024 at 16:07

To: Paul Davies <pauld@retirement.capital>

Cc: Esther Salmon <esther@retirement.capital>, Kiran Kaur <Kiran.Kaur@metrobank.plc.uk>

Good afternoon,

I have set out below our initial requirements for the onboarding of the new entity, but it would be good if we could have a quick call sometime this week to talk through in more detail.

To set up the services on our systems we will require the following. Can you please return these documents to Kiran, copied in and myself.

1. A copy of your authorised signatory list for Sentinel Pension Trustees Ltd (on letter headed paper)
2. ID&V form (attached) plus Certified copy passport and recent utility bill for all directors (if not already known to us)
3. Completed due diligence Questionnaire (attached)

Re the switching of Scheme administrator, I'm assuming you will have a deed of amendment for each scheme which I suggest is supplemented by a covering letter signed by existing trustees confirming new signing rights on the account. But we can discuss in more detail during our call.

Please can you let me know your availability this week?

Kind regards

Paul Brewington

Relationship Manager

Partnerships



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