Legal & General Assurance Society Limited

Corporate Pension Claims

Ground Floor Knox Court

10 Fitzalan Place

Cardiff

CF24 0EB

6th September 2023

Client name: **XXXX**

Pension Company Policy/Plan Number: **XXXX**

To Whom it may concern,

Please find enclosed a completed application from XXXXX to transfer her pension out into a SSAS called “XXXXXX”, together with the following documents:

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

I would be most grateful if you may process XXXXXX’s request at your earliest convenience. Should you require any further information, please do not hesitate to contact us.

Yours Sincerely

Scheme Administrator