



Lisa Welton <lisa@retirement.capital>

Re: Transfer out - 2799811201 Derek Abram L&G - Abram Pension Plan SSAS

1 message

Derek Abram <derek@dba-hrsolutions.com>
To: Lisa Welton <lisa@retirement.capital>
Cc: Veronica Walkman <veronica@retirement.capital>

19 September 2023 at 11:12

Hi Lisa,

I chased L&G yet again yesterday (via email). I copied in their complaints and transfer teams to observe that I am still waiting for any sort of update on my transfer. Sadly, this means my customer complaint remains ongoing. I will update you when I know more.

Scottish Widows will be chased again this week.

Deirdre is still chasing Aviva and, like me, has more than one official customer complaint on--going.

Best regards

Derek Abram

Sent from [Outlook for Android](#)

From: Lisa Welton <lisa@retirement.capital>
Sent: Tuesday, September 19, 2023 10:06:48 AM
To: Derek Abram <derek@dba-hrsolutions.com>
Cc: Veronica Walkman <veronica@retirement.capital>
Subject: Re: Transfer out - 2799811201 Derek Abram L&G - Abram Pension Plan SSAS

Good morning Derek

I hope you are well... Please can you advise if you have any further updates from Legal & General.
Can you advise where they are with the process or request an update from them please?

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.



Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: lisa@retirement.capital

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Venture Wales Building
Merthyr Tydfil Industrial Business Park
Merthyr Tydfil
Wales
CF48 4DR

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On Fri, 1 Sept 2023 at 09:46, Lisa Welton <lisa@retirement.capital> wrote:

Good morning Derek,

Do you have any further updates on this transfer?

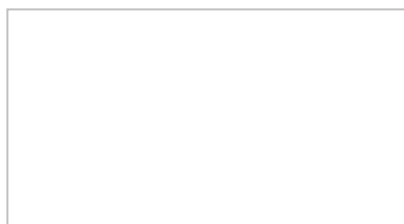
If they have not been in contact with you since your last correspondence around 17 August please get in contact with them.

If you wish at any point for us to help with chasing please let me know.. I wait to hear from you.

Kind Regards,

Lisa

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On Fri, 18 Aug 2023 at 09:43, Derek Abram <derek@dba-hrsolutions.com> wrote:

Hi Lisa,

I forwarded your email yesterday but also raised a customer complaint. If the Pensions Specialist had bothered to read the documentation they would have easily drawn the conclusion that this decision was being driven by Deirdre and me in a sensible and considered manner. L&G took 50 minutes on the call and could not articulate what they are now saying - they just said they haven't got the documents, so I needed to send them again. Their customer service was shocking, vague and unhelpful - hence the complaint.

For your information, Scottish Widows are going to receive an Exec level complaint from me as the previous customer complaint should have been answered within 5 working days and that has now passed with no response whatsoever. That's completely unacceptable in my book.

Wesleyan have completed the transfer whilst the others are dithering about. They are being prodded hard to get on with things!

Best regards

Derek Abram

Sent from [Outlook for Android](#)

From: Lisa Welton <lisa@retirement.capital>

Sent: Friday, August 18, 2023 8:31:40 AM

To: Derek Abram <derek@dba-hrsolutions.com>

Cc: Veronica Walkman <veronica@retirement.capital>

Subject: Re: Transfer out - 2799811201 Derek Abram L&G - Abram Pension Plan SSAS

Good morning Derek,

I hope you are well.

As you wish.. But I would advise, if it is easy enough to forward the information to them to honor their request. This is their procedures to ensure you are not under any duress to transfer your pension out from them. All companies have their different protocols.

Kind Regards,

Lisa

On Thu, 17 Aug 2023 at 15:49, Derek Abram <derek@dba-hrsolutions.com> wrote:

Hi Lisa

I'm just on the phone right now with them airing my annoyance that they have already had all this stuff and it is self-evident they have because it was the email you sent that has prompted today's response from them!

Merely sending the info to another email address is pointless - they can re-direct internally.

Best regards

Derek Abram

Sent from [Outlook for Android](#)

From: Lisa Welton <lisa@retirement.capital>

Sent: Thursday, August 17, 2023 2:43:07 PM

To: Derek Abram <derek@dba-hrsolutions.com>

Cc: Veronica Walkman <veronica@retirement.capital>

Subject: Re: Transfer out - 2799811201 Derek Abram L&G - Abram Pension Plan SSAS

Good afternoon Derek,

Please find attached correspondence from L&G advising they have all of the correct information but have still written to you on 17th August requesting you send this in the employment information directly to them.

You can easily forward my email dated the 10th July to them requesting the transfer to them at transfersduediligence@landg.com

Alternatively, I have also attached the employment documents which is what they have mention requesting from you in the attached correspondence:

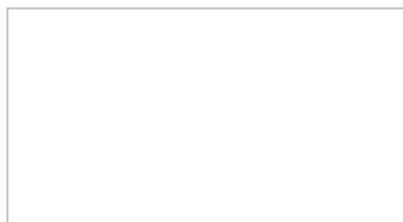
1. Company contributions schedule letter
2. Company employment letter
3. 3 months payslips
4. P60 2022-2023
5. SSAS Metro bank Statement
6. L&G letter requesting information to be sent directly from you

Please advise once you have sent this on to them so we can keep the files updated. Or you can cc me in the email.

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.



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On Wed, 2 Aug 2023 at 13:49, Lisa Welton <lisa@retirement.capital> wrote:

Good afternoon Derek,

I have a note in the system from 27/07 that you wanted to chase the transfers yourself.
Please can you confirm if this is correct so I am not chasing unnecessarily.

Kind regards
Lisa

On Tue, 18 Jul 2023 at 13:19, Lisa Welton <lisa@retirement.capital> wrote:

Hi Derek,

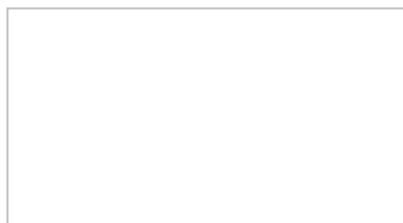
Please find attached letter received today from L&G acknowledging they have received the documents and are now starting the transfer process.

If nothing is heard back from them within a couple of weeks I will contact them for an update.

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.



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On Mon, 10 Jul 2023 at 14:29, <info@rcadministration.com> wrote:
Dear Transfers team,

Client name: **Mr. Derek Abram**
Pension Company Policy/Plan Number: **2799811201 - PX WORKSAVE BUYOUT PLAN**

Please find attached a completed application from Mr. Abram to transfer his pension out, together with the below listed documents, these have also been posted to you:

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. 3 months' payslips (April, May & June 2023)
11. P60 2022 - 2023
12. Authority Letter
13. SSAS Metro bank Statement
14. SSAS Metro Bank account details
15. Members Guide

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

Kind regards
Lisa Welton

RC Administration Limited

Phone: 0330 311 0839

[1A Park Lane](#)
Poynton
Cheshire
SK12 1RD

Company Number: 12409200

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