



Emily McAlister <emily@retirement.capital>

Adept Asset Solutions Ltd Pension Scheme - Hargreaves Lansdown

2 messages

Vikki Whitby <vikki@retirement.capital>

28 January 2022 at 10:45

To: tim@adeptassetsolutions.co.uk

Cc: Emily McAlister <emily@retirement.capital>

Hi Tim,

Emily passed on the email regarding your transfer from Hargreaves Lansdown.

I have called this morning and spoken to Rachel at HL and she has advised that the transfer had been suspended pending a request to transfer to another provider due to an issue with transferring to your SSAS.

Rachel checked and they had received your message from 24th January where you confirmed to go ahead with the transfer to the SSAS and now have started the process for your transfer.

She also advised that this looks like a 'partial' cash transfer which contradicts the information in your email to Emily. I have attached your original transfer form which shows a £95,000.00 cash transfer was originally requested. They expect to process the partial cash transfer next week.

Rachel advised that if you want a full cash transfer and/or your shares transferred across, they can arrange this but you would need to put a secure message on the portal today to confirm this.

If you have any queries, please let me know.

Kind Regards

Vikki Whitby

Retirement
.Capital

Web: <https://retirement.capital>

Phone: 0330 311 0088

Email: vikki@retirement.capital

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**HL Transfer Out Form Nov 20.pdf**

1845K

Emily McAlister <emily@retirement.capital>
To: Vikki Whitby <vikki@retirement.capital>

28 January 2022 at 12:50

Hi Vikki,

Thank you for helping with that.

Emily

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