



Lisa Welton &lt;lisa@retirement.capital&gt;

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**Fwd: information needed UKT-432789 & UKT-432817**

1 message

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**miro sroka** <mirosroka@gmail.com>  
To: Lisa Welton <lisa@retirement.capital>

22 September 2023 at 12:10

Hi Lisa,

Ive recwived today again same email.

Do i need to book two appointments for each pensions scheme seperately or one for both is ok? Looking at the email its 2 references mention3d in one so one booking should be ok im guessing.

Many thanks  
Miro

----- Forwarded message -----

From: **Claims Vetting Team MB** <claimsvettingteam@aegonservicing.co.uk>  
Date: Fri, 22 Sep 2023, 09:24  
Subject: RE: information needed UKT-432789 & UKT-432817  
To: [mirosroka@gmail.com](mailto:mirosroka@gmail.com) <[mirosroka@gmail.com](mailto:mirosroka@gmail.com)>

Our reference: UKT-432789 &amp; UKT-432817

Good Morning,

I'm writing regarding your request to transfer your Aegon pension to the Akors SASS administered by RC Administration Limited, trading as Retirement Capital.

Aegon treats its obligation to carry out appropriate due diligence on transfers seriously in order to protect the interests of our customers and ensure the integrity of the transfer. As part of our process, we have sent you information by email about pension scams with links to The Pensions Regulator and Financial Conduct Authority.

Your pension is likely to be one of your most valuable assets and, like anything valuable, it can become the target of scams. As your current pension provider, we hope you appreciate the need for us to be vigilant to protect you against a possible scam.

-We follow the "Combating Pension Scams - A Code of Good Practice" industry guidance and the recent regulation changes which came into force during November 2021. This is to ensure our customers do not fall victim to a scam and they are fully aware of the transfer.

In accordance with The Occupational and Personal Pension Schemes (Conditions for Transfers) Regulations 2021 we need you to take mandatory pension scams guidance from MoneyHelper. a free and impartial government service, before we can proceed further. You can get in touch with MoneyHelper by:

- Visiting [www.moneyhelper.org.uk/pension-safeguarding](http://www.moneyhelper.org.uk/pension-safeguarding) where you can arrange an appointment and find further contact details.
- You can also book by calling 0800 015 4906 free or, if you're overseas, by calling +44 20 7630 2283

\*International call charges may apply

Once you have had your appointment, MoneyHelper will give you evidence of this guidance. Please provide us with this evidence when confirming you've received it. Please note you will only be able to book an appointment via these methods.

In addition, if you do wish to proceed with the transfer after your appointment, I would ask that you complete and return the enclosed Declaration Indemnity Discharge form. The form should be signed by you and a witness. The witness should not be a person who is related to the policyholder.

To find out more about protecting yourself from pension scams and how to avoid them, visit the Financial Conduct Authority (FCA) website at [fca.org.uk/scamsmart](http://fca.org.uk/scamsmart) or Money Helper at [moneyhelper.org.uk/en/money-troubles/scams/how-to-spot-a-pension-scam](http://moneyhelper.org.uk/en/money-troubles/scams/how-to-spot-a-pension-scam).

We also recommend that you seek advice from a regulated financial adviser, authorised by the FCA. If you don't have a financial adviser, you can visit [moneyhelper.org.uk/choosing-a-financial-adviser](http://moneyhelper.org.uk/choosing-a-financial-adviser) to find the right one for you.

Warm Regards

Shikha Singhal

Case Officer

Atos BTS, Claims 1

Tel: 03456 10 00 10

Claims dept for AEGON Existing Business  
Aegon, Edinburgh Park, Edinburgh, EH12 9SE – UK

Next steps

- If there's anything else I can help you with, please let me know within the next 10 working days or for any other queries, please call us on 03456 100 010 (Monday to Friday from 10.00am - 4.00pm) or you can find us at [aegon.co.uk/onlineform](http://aegon.co.uk/onlineform)
- If any correspondence has been issued as part of your query this will be received within the next 3 to 5 working days

You may receive a short survey from us and

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**From:** Claims Vetting Team MB  
**Sent:** Monday, August 28, 2023 11:08 AM  
**To:** [mirosroka@gmail.com](mailto:mirosroka@gmail.com)  
**Subject:** information needed UKT-432789 & UKT-432817

Our reference: UKT-432789 & UKT-432817

Good Morning,

**Your transfer out request- questionnaire completion request**

We've received a request from RC Administration Limited to transfer your Aegon pension funds to the Akors SSAS. Please complete for both plans.

Government regulations introduced from November 2021 require conditions to be satisfied before we can approve and complete your transfer.

These safety checks are to help protect you from pension scams and are important to help keep your savings safe. It may mean that it takes a little longer for us to complete your transfer.

Having completed the initial checks required of us under The Pension Schemes Act 2021, we identified that we need additional information to allow the transfer to proceed.

To protect your interests and to allow us to better understand the circumstances of this transfer we ask that you complete the enclosed **UK transfer questionnaire**- please complete and return it to us at the address shown below or alternatively reply to this email.


Aegon Scottish Equitable Pensions and Bonds  
Sunderland  
SR43 4DS

We've also attached The Pension Regulator's and Financial Conduct Authority's Scams leaflet, which explains the dangers of pension scams and what you should do to protect yourself.

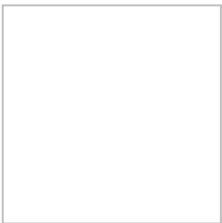
If you have any questions about this, please contact your financial adviser if you have one or call us on 03456 10 00 10

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call us or visit [aegon.co.uk/onlineform](https://aegon.co.uk/onlineform)

Kind regards,

 Atos logo

Lana Saunderson  
Customer Service Representative – Claims 1 (NIGO)  
AEGON Existing Business– Edinburgh  
[atos.net](https://atos.net)  
 BTS banner



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DISCLAIMER

If you email us, we may keep a record of your name and email address. We protect our system from malicious software and viruses and recommend you do the same.

6 attachments



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3K



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62K



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57K



image002.png  
62K



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