



Lisa Welton <lisa@retirement.capital>

Re: Transfers: Akros SSAS - Aegon 8163166 / 8801030 - Miroslaw Sroka

1 message

Lisa Welton <lisa@retirement.capital>

22 September 2023 at 10:30

To: miro sroka <mirosroka@gmail.com>

Cc: Veronica Walkman <veronica@retirement.capital>

Hi Miro,

Further to my email below..

I did not see the Declaration Indemnity form they had attached.

They are allowing you if you wish to opt out of the Money helper... If you wish to proceed without taking their advice please sign and you will need to get a witness to complete the form.

Please send me a copy of the attached pre completed form if you wish to proceed.

If you wish to obtain the money helper appointment please advise and I will await your appointment confirmation.

Kind regards

Lisa

On Fri, 22 Sept 2023 at 10:18, Lisa Welton <lisa@retirement.capital> wrote:

Good morning Miro,

You will need to make an appointment with the money helper to complete your transfer... This is the final stage of their procedure, so this is good news. The call normally takes approx 30/45 minutes. I have provided some details below. Once this appointment is completed you will receive a confirmation email from the Money Helper with **a unique reference number**.

When you have made an appointment with them please advise me of when the appointment is so I can log this. I have put some information below

A lot of pension providers require that the transferring member has an appointment with Pension Wise before they agree to transfer the funds out. We feel that if you say that you opt out from receiving this guidance they may see it as a red flag and therefore recommend that you book an appointment with them. I have included some information below that explains how to book it. The appointment is free of charge. As there is sometimes a long waiting time I would suggest booking it as soon as possible.

The purpose of this guidance is to help identify common risks involved in transfers, highlight the dangers of pension scams, and to allow you to consider whether to proceed with your transfer.

You can book your 'Pension Safeguarding Guidance' appointment with MoneyHelper at: www.moneyhelper.org.uk/pension-safeguarding. Or call: 0800 015 4906 for free or, if you're overseas, +44 20 7932 5780 (international charges may apply). The booking lines are open Monday to Friday, 9am to 5pm (UK time).

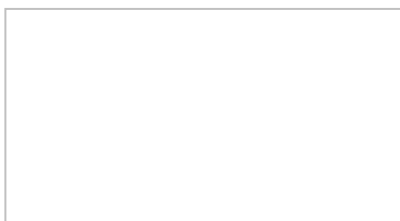
*After your MoneyHelper guidance session, you will receive correspondence from MoneyHelper with **a unique reference number**.*

Please provide this reference number to us.

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

Data Processing Centre

Retirement.Capital

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On Thu, 21 Sep 2023 at 21:19, miro sroka <mirosroka@gmail.com> wrote:

Hi Lisa,

Please see email I recieved from Aegon

Many thanks

Miro

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

From: **Claims Vetting Team MB** <claimsvettingteam@aegonservicing.co.uk>

Date: Thu, 21 Sep 2023, 15:14

Subject: Information needed UKT-432817

To: mirosroka@gmail.com <mirosroka@gmail.com>

Our reference: UKT-432817

Good Afternoon Mr Sroka,

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 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 or Money Helper at 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 to find the right one for you.

The Indemnity form will need to come back through post to –

Freepost RUCB-LJKR-HHBU

Aegon

Sunderland

SR43 4DU

When returning information please include the above reference and policy number.

Please email claimsvettingteam@aegonservicing.co.uk outstanding information.

Kind Regards


 Atos logo

Lana Saunderson

Customer Service Representative – Claims 1 (NIGO)

AEGON Existing Business– Edinburgh

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 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.



UK Transfer Indemnity Form- Miroslaw Sroka.pdf

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