



Lisa Welton <lisa@retirement.capital>

RE: Akors SSAS - L&G Transfer completed (windback?)

1 message

Agnieszka Niewiadomska <Agnieszka.Niewiadomska@synthomer.com>

30 January 2024 at 11:22

To: Lisa Welton <lisa@retirement.capital>

Cc: "miro@akorsproperty.com" <miro@akorsproperty.com>, Veronica Walkman <veronica@retirement.capital>

Hi Lisa,

Many thanks for your mail.

Here is the answer I have received from my contact:

I have spoken with Gavyn regarding the below. It has been confirmed that your full pension pot has been transferred to the new provider.

In order to ensure your January onward pension is paid into Legal and General, I will set you up with a new pension plan. Following this you will receive new documents from Legal and General to confirm this.

If you do have any queries about your previous pension account, you can reach out to the L&G specific team using the below details:

Kind regards,

Aga

Agnieszka Niewiadomska | Procurement Manager - Strategic Raw Materials | Group Procurement | 
| Mobile: +44 7894608292
E-Mail: Agnieszka.Niewiadomska@synthomer.com | Web: www.synthomer.com

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From: Lisa Welton <lisa@retirement.capital>**Sent:** 30 January 2024 10:02**To:** Agnieszka Niewiadomska <Agnieszka.Niewiadomska@synthomer.com>**Cc:** miro@akorsproperty.com; Veronica Walkman <veronica@retirement.capital>**Subject:** Re: Akors SSAS - L&G Transfer completed (windback?)

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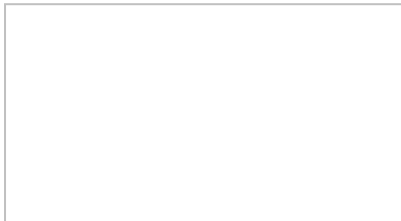
Hi Aga,

Please can you advise what you have decided to do with this completed transfer... If we are to request the wind back or if your employer will set up a new policy for you?

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

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

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On Mon, 22 Jan 2024 at 12:14, Agnieszka Niewiadomska <Agnieszka.Niewiadomska@synthomer.com> wrote:

Dear all,

I am currently in contact with dedicated to my work company L&G team.

The leader was on holiday last week.

They will advice the best approach this week.

If I understand the situation correctly, my employer contributed last time on 15-16 January, then the transfer of money to SASS took place and the account got closed.

The next contribution will be done by my employer on 15-16 of Feb, so I hope they will open new policy/account for me by then.

I asked for the last statement before the account closure and feasibility when my new account could be possibly opened. Still awaiting their answer.

I will keep you updated.

Kind regards,

Aga

Agnieszka Niewiadomska | Procurement Manager - Strategic Raw Materials | Group Procurement | 

| Mobile: +44 7894608292

E-Mail: Agnieszka.Niewiadomska@synthomer.com | Web: www.synthomer.com

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From: Lisa Welton <lisa@retirement.capital>

Sent: 22 January 2024 10:14

To: Agnieszka Niewiadomska <Agnieszka.Niewiadomska@synthomer.com>

Cc: miro@akorsproperty.com; Veronica Walkman <veronica@retirement.capital>

Subject: Re: Akors SSAS - L&G Transfer completed (windback?)

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Good morning Aga

I have just left a message on your voicemail.

The funds are now in the SSAS account. Please advise me if you have spoken to the sponsoring employer that has been contributing to the L& G fund and how you wish to proceed with this situation. If you wish to ask L&G to complete the wind back or if your sponsoring employer can advise you of a new policy.

I have attached the SSAS Statement for your reference.

Kind regards

Lisa

----- Jan 19, 2024 05:54 PM lisa@retirement.capital wrote -----

Hi Aga,

You can contact me on 0330 311 0088 or 0330 311 0839

You will need to ask for me.

Kind regards

Lisa


----- Jan 18, 2024 11:49 PM Agnieszka.Niewiadomska@synthomer.com wrote -----

HI Lisa,

Please could you share with me the number I can call you today?

Many thanks,

Aga

Agnieszka Niewiadomska | Procurement Manager - Strategic Raw Materials | Group Procurement | 
| Mobile: +44 7894608292
E-Mail: Agnieszka.Niewiadomska@synthomer.com | Web: www.synthomer.com

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From: Lisa Welton <lisa@retirement.capital>

Sent: 19 December 2023 11:36

To: Agnieszka Niewiadomska <Agnieszka.Niewiadomska@synthomer.com>

Subject: Re: Kind request

CAUTION: This email originated from outside the organisation. Do not click links or open attachments unless you recognize the sender and know the contact is safe.

Morning Aga,

Your unique reference number: 893586/081123

Please advise me once you have sent this back to them or cc me. So I can make a follow up.

Kind Regards,

Lisa

On Tue, 19 Dec 2023 at 12:29, Agnieszka Niewiadomska <Agnieszka.Niewiadomska@synthomer.com> wrote:

Hi Lisa,

I found the form.

Could you advice what should I insert for Money and Pension Advice Service reference number?

MEMBER DECLARATION

Once you have considered the points in our referral and would still like to proceed with the transfer, please complete the below declaration indicating you have understood this letter and are happy with the below points.

I agree and acknowledge that Legal & General:

- A. Does not know whether or not the receiving scheme is designed to provide access to my pension benefits earlier than is normally permitted.
- B. May carry out checks to establish whether the receiving scheme is registered with HMRC.
- C. May carry out checks to establish whether the transfer would be a recognised transfer for HMRC's purposes.
- D. May delay to make the transfer until it has satisfied itself that:
 - I. the receiving scheme is registered with HMRC, and
 - II. the transfer would be a recognised transfer for HMRC's purposes
- E. Will let me know if it requests additional information from the receiving scheme to satisfy itself of the facts described in D)(i) and (ii) above.
- F. Will calculate the transfer value based on policy terms and conditions when it has received all the additional information and has satisfied itself of the facts described in D)(i) and (ii) above, OR
- G. Will write to me if it has not satisfied itself of the facts described in D)(i) and (ii) above
- H. will have no liability in respect of my pension benefits after it has made the transfer.


I declare and confirm that:

- A. I have exercised my statutory right to require Legal & General to transfer my pension benefits to the receiving scheme.
- B. I understand that the receiving scheme is registered with HMRC.
- C. I have read and understood the regulatory leaflet, together with the regulatory information on www.legalandgeneral.com/protectyoursavings, that Legal & General has given me.
- D. I have read and understood the 'Things To Consider When Transferring A Pension' and how this may impact me.
- E. I understand that, if the receiving scheme is designed to provide access to my pension benefits earlier than is normally permitted (i.e. before age 55), there is a serious risk of significant tax charges. There may also be a risk that the receiving scheme charges significant fees.
- F. I will not hold Legal & General responsible in any way and I will not seek any compensation, or seek any payment of any kind from Legal & General, and will not ask Legal & General to take any action in relation to any tax charges, any significant fees or any other losses of any kind which arise because of the transfer.
- G. I hereby discharge Legal & General Assurance Society Limited from any and all liability under this Scheme.
- H. This declaration is true and correct

Money and Pensions Advice Service reference number

Signed

Date

Agnieszka Niewiadomska | Procurement Manager - Strategic Raw Materials | Group Procurement | 
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