



Lisa Welton <lisa@retirement.capital>

Transfer for Bill Holdsworth SSAS - True Potential

1 message

Georgina Martin <georginam@retirement.capital>
To: Lisa Welton <lisa@retirement.capital>

15 August 2023 at 09:47

Hi Lisa,

Could you please send a transfer pack to Bill?

bill.holdsworth@jamesholdsworth.com

I have asked him for the email address for his accountant (we are meant to copy him in) but as he has not responded yet we may just email him and suggest that he forwards the email to his accountant.

We are expecting the bank account to be opened in about 2 working days.
Then Bill will pay the following contributions:

£150 the day of account opening (presumably the 16th or 17th of August)
£150 01 September
£150 01 October

There are payslips from the company so this requirement is satisfied.

This will be a similar process to Tom Janion. We know the IFA that works for True Potential and I have all the email addresses. There will be no long chaser calls required, I have the email for their transfer team.

Kind regards
Georgina



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