



Lisa Welton <lisa@retirement.capital>

Re: Update: Transfer out - VG0407710 - Edward Brunt - Edward Brunt SSAS

1 message

Lisa Welton <lisa@retirement.capital>

1 June 2023 at 13:45

To: "edbrunt@actioncoach.co.uk" <edbrunt@actioncoach.co.uk>

Cc: Georgina Martin <georginam@retirement.capital>

Hi Ed,

You will see the emails I have been sending to Vanguard. Please can you check your online portal and also ask them for an update. Nothing has been confirmed. They will not speak to me on the phone and are not returning my emails either (below). Even though there is an Authority Letter in place.

Lisa

On Thu, 1 Jun 2023 at 13:41, <info@rcadministration.com> wrote:

Dear Transfers team,

Client name: **Edward Brunt**Policy No: **VG0407710**NINo: **JH260270C**

Please can you give an update on this transfer. Nothing has been heard since the submission of all the documents on the 18th May 2023

I have been advised I am unable to speak to someone on the phone as a third party and to contact by email.

I would be most grateful if you would please send an update on this transfer out.

All of the documents listed in the below chain of emails were also posted out to you. Thank you

Kind regards,
Lisa Welton

RC Administration Limited

Phone: 0330 311 0839

1A Park Lane
Poynton
Cheshire
SK12 1RD

Company Number: 12409200

IMPORTANT - PLEASE NOTE The information transmitted is intended only for the person or entity to which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of or taking of any action in reliance upon this information by persons or entities other than the intended recipient is prohibited. If you received this in error please contact the sender and destroy this email.

On 25/05/2023 10:32 CEST info@rcadministration.com wrote:

Dear Transfers team,

Client name: **Edward Brunt**Policy No: **VG0407710**NINo: **JH260270C**

I hope this email finds you well...

I have been advised I am unable to speak to someone on the phone as a third party and to contact by email.

I would be most grateful if you would please send an update on this transfer out.

All of the documents listed in the below email were also posted out to you. Thank you

Kind regards
Lisa Welton
RC Administration Limited

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----- Original Message -----

From: info@rcadministration.com

To: "Vanguard.PensionAdmin@fnz.co.uk" <Vanguard.PensionAdmin@fnz.co.uk>

CC: "Personalinvestors@vanguard.co.uk" <Personalinvestors@vanguard.co.uk>, "edbrunt@actioncoach.co.uk" <edbrunt@actioncoach.co.uk>

Date: 18/05/2023 09:36 CEST

Subject: Transfer out - VG0407710 - Edward Brunt - Edward Brunt SSAS

Good morning Transfers team,

Client name: **Edward Brunt**
Pension Company Policy/Plan Number: **VG0407710**
NINO: **JH260270C**

Please find enclosed a completed application from Edward Brunt to transfer his pension out, together with the following documents:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Screen shot
5. HMRC Tax Registration Letter
6. Metro SSAS Bank Account Details
7. Metro SSAS Bank Statement
8. Authority Letter
9. Company contributions schedule letter
10. Company Employment Letter
11. Payslips (Mar, Apr & May 2023)
12. Personal Bank Statements (3 months)

I would be most grateful if you may process Edward Brunt's request at your earliest convenience. Should you require any further information, please do not hesitate to contact us

Kind regards,
Lisa Welton

RC Administration Limited

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Poynton

Cheshire
SK12 1RD

Company Number: 12409200

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