

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

To info@rcadministration.com • Jodie Devlin <jodie.mitchell@fnz.com> •
Stephen Elder <stephen.elder@fnz.co.uk> Copy vanguardcomplianceoffice@vanguard.com •
personalinvestors@vanguard.co.uk

Good evening,

We have now completed the transfer of assets from our scheme to yours in relation to the above noted mutual client.

Please find our Transfer Confirmation Letter attached to this email; the attached confirmation has been password protected using the customer's NINO in all upper caps.

Kind regards,

Barry

From: info@rcadministration.com <info@rcadministration.com>
Sent: Thursday, June 1, 2023 11:42 AM
To: Vanguard Pension Admin <Vanguard.PensionAdmin@fnz.co.uk>
Cc: edbrunt@actioncoach.co.uk; vanguardcomplianceoffice@vanguard.com; personalinvestors@vanguard.co.uk
Subject: Re: Update: Transfer out - VG0407710 - Edward Brunt - Edward Brunt SSAS

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

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

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.

----- 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

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.

Email Disclaimer

FNZ (UK) Ltd registered in England and Wales (05435760) 10th Floor, 135 Bishopsgate, London EC2M 3TP, FNZ (UK) Ltd is authorised and regulated by the Financial Conduct Authority (438687); FNZ TA Services Ltd registered in England and Wales (09571767) 10th Floor, 135 Bishopsgate, London EC2M 3TP, FNZ TA Services Ltd is authorised and regulated by the Financial Conduct Authority (932253); FNZ Securities Ltd registered in England and Wales (09486463) 10th Floor, 135 Bishopsgate, London EC2M 3TP, FNZ Securities Ltd, is authorised and regulated by the Financial Conduct Authority (733400); JHC Systems Limited registered in England and Wales (08729370) Temple Point 6th Floor, 1 Temple Row, Birmingham, West Midlands, B2 5LG; FNZ (Europe) DAC registered in Ireland (657886) Block C, Irish Life Centre, Lower Abbey Street, Dublin 1, D01V9F5, Ireland; FNZ SA (Pty) Ltd registered under the laws of South Africa (2018/547997/07), 1st floor, Newport House, Prestwich Street, Greenpoint, western Cape, 8001; FNZ Limited registered in New Zealand (1797706) FNZ House, Level 3, 29A Brandon Street, Wellington, 6011 New Zealand; FNZ (Australia) Pty Ltd registered in Australia (138 819 119) Level 1, 99 Elizabeth St, Sydney 2000; FNZ (Hong Kong) Limited registered in Hong Kong (1305362) 6A-1, Koshun House, 331 Nathan Road, Hong Kong; FNZ (Singapore) Services Pte. Ltd. registered in Singapore (201307199R) 61 Robinson Road, #13-03A, Robinson Centre, Singapore (068893); and FNZ (China) Ltd registered in China (91310115MA1K3G4K6T) [中国（上海）自由贸易试验区世纪大道1196号二座20层]. This message is intended solely for the addressee and may contain confidential information. If you have received this message in error, please send it back to us, and immediately and permanently delete it. Do not use, copy or disclose the information contained in this message or in any attachment. Emails sent to and from FNZ may be monitored and read for legitimate business purposes. Emails cannot be guaranteed to be secure or error-free, and you should protect your systems. FNZ does not accept any liability arising from interception, corruption, loss or destruction of this email, or if it arrives late or incomplete or with errors or viruses. For more information about the FNZ group please visit our website [here](#) where you can also find links to our policies including our Privacy policy which provides information about what we do with your personal data.

-
- VG0407710 - Brunt Transfer Out Confirmation Letter - Receiving Scheme.docx (107 KB)