

Fwd: Re: EL1456187 K Daly - FNK SSAS

To elevatetransferaway@abrdrn.com Copy hi@kdaly.me

Good morning Transfers team,

We have received an out of office reply to the below email response to your request to continue this transfer case.

Client name: **Kim Daly**
Elevate Account number: **EL1456187**
NINo. **NY173368A**

I would appreciate it if this case can be continued in Joanne's absences of leave.

Kind regards
Lisa Welton

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

From: info@rcadministration.com
To: [Joanne MacCawley \(Elevate\)](#)
CC: hi@kdaly.me
Date: 10/10/2023 06:35 BST
Subject: Re: EL1456187 K Daly - FNK SSAS

Dear Joanne,

Client name: **Kim Daly**
Elevate Account number: **EL1456187**
NINo. **NY173368A**

Please find attached the below listed documents as requested.

1. Trust Deed
2. Appointment of Administrator
3. Letter from bank

I can confirm there are currently no professional trustees with this scheme.

Should you require any further information, **please do not hesitate to contact us.**

Kind regards
Lisa Welton
RC Administration Limited

Phone: 0330 311 0839

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Poynton
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SK12 1RD

Company Number: 12409200

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On 06/10/2023 23:05 BST Joanne MacCawley (Elevate) <joanne.maccawley@abrdn.com> wrote:

Good Evening

Thank you for sending transfer forms and other supporting documentation.

I have written to the client to provide additional Employment Link Evidence as I am unable to accept solely on the documents sent in by yourselves.

I would be grateful if you could provide me with the Deed of Variation to the Original Establishing Trust Deed to evidence your appointment as scheme administrator, and that of any professional trustees.

Please arrange for a formal letter from Metro Bank confirming the operating mandate for the bank account.

Kind Regards

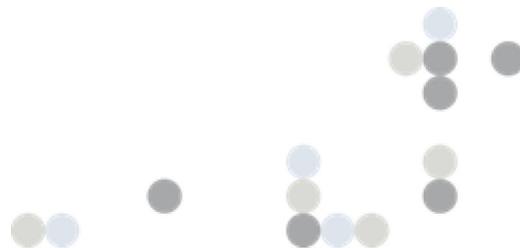
Jo



Joanne MacCawley (Elevate)
Third Party Services

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- 02. FNK_SSAS_-_Appointment_of_Administrator_Resolution.docx.pdf (406 KB)
 - 01. FNK SSAS - Trust Deed Signed.pdf (1 MB)
 - 03. Metro Bank Letter FNK SSAS.pdf (254 KB)
 - image001.png (5 KB)
 - image002.png (13 KB)
 - image003.png (4 KB)