



Lisa Welton <lisa@retirement.capital>

Fwd: EL1456187 K Daly Transfer To FNK SSAS

1 message

Kim <kim.daly1@googlemail.com>
To: Lisa Welton <lisa@retirement.capital>

24 October 2023 at 15:04

Hi Lisa,

This is the latest mail I received from Elevate re the transfer for my pension with them. The questions were similar to the Legal & General ones so I sent a reply.

Sorry I realised I did not cc you into this mail so please see below. I have received nothing further from them at this time.

Thanks
Kim

Begin forwarded message:

From: Kim <kim.daly1@googlemail.com>
Date: 17 October 2023 at 15:23:25 BST
To: "Joanne MacCawley (Elevate)" <Joanne.MacCawley@abrdn.com>
Subject: Re: EL1456187 K Daly Transfer To FNK SSAS

Hi Joanne,

I have received your letter and read the information provided. I still wish to proceed with this transfer out request.

Please see below for my response to your questions.

Many thanks
Kim Daly
Tel: 0771 991 3295

On 6 Oct 2023, at 23:05, Joanne MacCawley (Elevate)
<Joanne.MacCawley@abrdn.com> wrote:

Good Evening

I am writing further to my letter to you dated 23/09/2023, which I hope you have had an opportunity to read.

In order for us to complete our mandatory due diligence checks in relation to your transfer request, we require your responses to the following questions:

- You stated you have not taken/received regulated financial advice, please confirm how you found out about the opportunity.

I own a property company investing in BTL properties and independently researched the ability to set up a SSAS pension.

- Do you know where your pension savings will be invested under the new scheme.

I plan to invest into Commercial Property and Global Tracker Funds

- Please confirm whether you have received any form of incentive in connection with this transfer request (for example, an offer of money or services).

I confirm that I have received no form of incentive

- Please confirm whether you have experienced any form of pressure to make the transfer in question, or to make it within certain timescales.

I confirm that I have received no pressure and there is no timescale

- Please provide a copy of any literature or brochures you have been given, detailing the costs and charges for the scheme.

There is an annual flat fee of £900 and an admin fee of £350 related to the transfer

Lind Regards

Jo

<image001.png>

Joanne MacCawley (Elevate)
Third Party Services

<image002.png>

T +44 345 600 2399

<image003.png>

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