

Joanne MacCawley (Elevate) <joanne.maccawley@abrdn.com>

8/12/2023 14:36

EL1456187 K Daly - FNK SSAS

To info@rcadministration.com Copy hi@kdaly.me

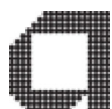
Hi

Just to keep you in the loop, I have submitted the case review to my Legal team to consider.

As soon as I have their response I will be in touch.

Kind Regards

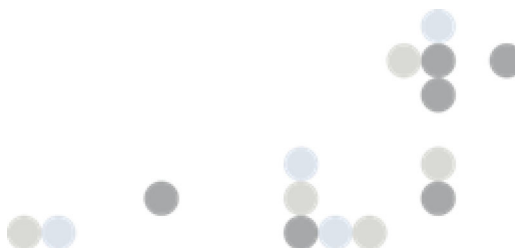
Jo



Joanne MacCawley (Elevate)
Third Party Services

T +44 345 600 2399

abrdn.com



From: info@rcadministration.com <info@rcadministration.com>
Sent: Tuesday, October 10, 2023 7:55 AM
To: ElevateTransfersAway <ElevateTransferAway@abrdn.com>
Cc: hi@kdaly.me
Subject: [EXT] Fwd: Re: EL1456187 K Daly - FNK SSAS

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.

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.

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

1A Park Lane
Poynton

Cheshire
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

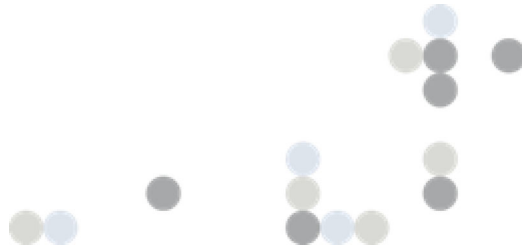
Jo



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 - image003.png (4 KB)