



Vikki Whitby <vikki@retirement.capital>

FW: Narainen SSAS transfer update

3 messages

Simon Carlin <simon@thelostcoin.co.uk>

9 August 2022 at 15:40

To: "Vikki Whitby (vikki@retirement.capital)" <vikki@retirement.capital>

Hi Vikki

Is there any progress on this case? Are you able to make the transfer payment? It should be for the total amount in MetroBank including interest, less my £750 fee which I can happily forward to you.

I wait to hear from you.

Regards,

Simon Carlin

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From: Emily McAlister <emily@retirement.capital>**Sent:** 08 August 2022 12:11**To:** Simon Carlin <simon@thelostcoin.co.uk>**Subject:** Re: Narainen SSAS transfer update

Hi Simon,

I have the letter - Vikki will follow this up tomorrow as priority. She has all of the details.

I won't have a chance to action it today as I need to make quite a lot of pension payments, sorry.

Kind regards

Emily

On Mon, 8 Aug 2022 at 13:01, Simon Carlin <simon@thelostcoin.co.uk> wrote:

Hi Emily

I know you must be extremely busy today, is there any progress on the Naraine SSAS transfer to Royal London. Apparently they sent a letter to you in mid July around the time I went on hols and I have heard nothing further. It would be good to sort this one, the transfer should be net of my fee of £750 which will clear the scheme's bank account.

Many thanks

Regards,

Simon Carlin BA DipPFS DipPMI

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Vikki Whitby <vikki@retirement.capital>
To: Simon Carlin <simon@thelostcoin.co.uk>

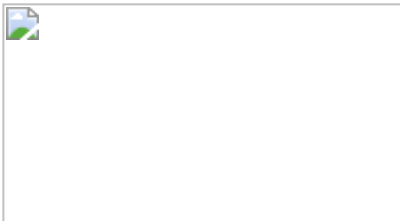
10 August 2022 at 08:14

Hi Simon,

I have been looking into this one. The letter required answers to some questions that I could not answer and therefore I have passed to a colleague for help. As soon as I have these answers I will be able to deal with the letter and transfer the funds.

Although I am covering for Emily, I don't do the exact same role as she does and therefore I have to seek help with certain information, I will do my best to get this resolved for you.

Kind Regards
Vikki Whitby



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Vikki Whitby <vikki@retirement.capital>
To: Simon Carlin <simon@thelostcoin.co.uk>

10 August 2022 at 10:28

Hi Simon

I have prepared the following information to send to Royal London. Do you want to forward this to them or will I need to do this?

Also, once this info has gone across to them, do we then prepare immediate payment or await their response so that we know they are happy with the details?

The Metro balance for Narainen SSAS is £162,065.09 minus your £750 fee leaves £161,315.09 to transfer.

Mr Marday Narainen

NI:- PX208272A

Narainen SSAS PSTR:- 00784950RD

The scheme was established on 05/07/2012 and was tax registered on 27/06/2012.

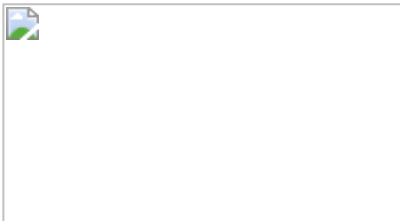
Mr Narainen was a member trustee of the Narainen SSAS from its inception on 5th July 2012.

Mr Narainen has already triggered his MPAA

The amount to be transferred is £161,315.09.

His fund is fully crystallised, and, as he is not in capped drawdown, GAD reviews are not relevant.

Kind Regards
Vikki Whitby



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