



Lisa Welton <lisa@retirement.capital>

Re: Transfer - Rafter Family Pension

Lisa Welton <lisa@retirement.capital>
To: Andy Rafter <arafter19@gmail.com>
Cc: Georgina Martin <georginam@retirement.capital>

19 May 2023 at 13:42

Thanks Andy,

Are you in the process of arranging financial advice for Tracy?

Kind Regards,

Lisa

On Thu, 18 May 2023 at 20:39, Andy Rafter <arafter19@gmail.com> wrote:
Yes, it is.

Andy Rafter

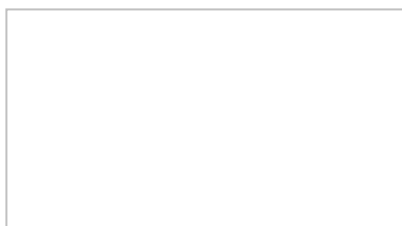
On Thu, 18 May 2023 at 09:04, Lisa Welton <lisa@retirement.capital> wrote:
Good morning Andy,

There is a record of a Mercer Santander pension of Tracy's from Sept 2022... Do you know if this the same scheme?

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.



Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: lisa@retirement.capital

Data Processing Centre

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On Wed, 17 May 2023 at 13:04, Andy Rafter <arafter19@gmail.com> wrote:

Good morning Lisa please find the Pension pack attached for my wife Tracy. Just waiting for the transfer figure now.

Regards,

Andy Rafter

On Tue, 9 May 2023 at 14:01, Lisa Welton <lisa@retirement.capital> wrote:

Dear Andy,

Please see the attached “**transfer pack**” and “**transfer process in**” document, as an explanation of what we need to prepare and send to the ceding scheme where your pension is currently held, along with the costs involved.

We have a dedicated team working on transfers as they can be time consuming and require accurate information from the beginning to ensure the transfer is not rejected. We have many years of experience in dealing with transfers and have put this pack together given our experience. If at any time you do not want us to make 'chaser calls' just let us know - that is fine.

- You will need to contact your current pension provider to request the transfer out forms (we do not use Origo or Options),,
- Supply your latest valuation from the ceding scheme.

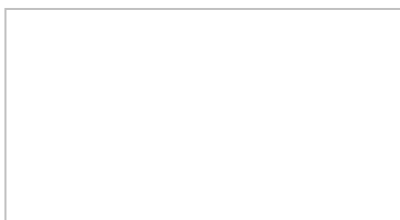
As per the attached ‘transfer process in’ document. It is most important: if you have not already done so, start to make **contributions from the sponsoring employer** (The Driffield Fruit Centre Limited) into the SSAS bank account as soon as possible. A min of £ 100.00 each per month. And that you have **PAYE in place with the sponsoring employer** and will be able to supply **personal bank statements** showing your salary payments to match your payslips.

I look forward to hearing from you. If you have any further questions, please do not hesitate to contact me

Kind Regards,

Lisa

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On Thu, 4 May 2023 at 12:28, David Nicklin <davidn@retirement.capital> wrote:

Morning Andy,

I have copied Lisa into this email as she deals with the transfer.

Lisa could you liaise with Andy on this

Dave

On Wed, May 3, 2023 at 12:58 PM Andy Rafter <arafter19@gmail.com> wrote:

Hi David, I hope you're well. You may recall we were looking at transferring my wifes old policy into our SSAS. She has had another valuation which is just under £34k so we think it's better utilised in the SSAS.

Can you get that ball rolling again for us please?

Regards,

Andy

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David Nicklin Cert PFS Cert CII (MP)

Web. <https://retirement.capital>

Mobile: 07535 010480

Phone: 0330 311 0088

Email: davidn@retirement.capital

Here is my digital business card:

<https://link.v1ce.co.uk/aaexg6/725177>

Please book in for a meeting

<https://calendly.com/connect-to-dave/ssas-discovery>

<https://calendly.com/connect-to-dave/ssas-launch>

<https://calendly.com/connect-to-dave/ssas-journey>

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