



Lisa Welton &lt;lisa@retirement.capital&gt;

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**Re: HL transfer questions - The Yin Family SSAS - Jacinta Yin**

1 message

**Lisa Welton** <lisa@retirement.capital>

29 January 2024 at 09:37

To: Jacinta Yin &lt;jacintayin@me.com&gt;

Good morning Jacina,

Please find attached the below listed documents.

1. Pre completed questionnaire - Review, sign & date
2. Payslips
3. Personal Bank statements
4. Company employment letter
5. Company contributions letter
6. Members Guide

You will need to return these documents to them directly by email or secure messaging if this is how they have contacted you.

Please make sure you put your policy details ( Client Number 3042238) in the subject so they can pick up your correspondence easily and quickly.

Please let me know when this has been sent to them (or cc me) so I can log this on your case and schedule a follow up with them if necessary.

Kind regards

Lisa Welton

My working hours are 8.00-14.00 Monday- Friday.

---- Jan 27, 2024 02:14 AM [jacintayin@me.com](mailto:jacintayin@me.com) wrote ----

Hi Lisa

Can I check if I'm meant to do anything with the questions? I'm guessing you will guide me on them?

Thanks

Jacinta

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**6 attachments****01. Client Questionnaire 0822- Jacinta Yin.pdf**

190K

**02. Payslips Oct nov dec 2023.pdf**

47K

**06. Member Guide.pdf**

551K

**04. Company employment letter - Jacinta Yin.pdf**

380K

**05. Company Contributions letter - Jacinta Yin.pdf**

1262K

**03. Personal Bank Statement Oct, Nov & Dec 2023.pdf**

5726K