



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

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**Re: Invoice - INV-000071 from RC Administration Limited - Sent Using Zoho Books**

1 message

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

26 July 2023 at 10:13

To: Derek Abram &lt;derek@dba-hrsolutions.com&gt;

Cc: Deirdre Abram &lt;deirdre@dba-hrsolutions.com&gt;, Vikki Whitby &lt;vikki@retirement.capital&gt;, Veronica Walkman &lt;veronica@retirement.capital&gt;

Good morning Derek,

I hope this email finds you well.

The transfer pack includes and states all the documents prepared and sent to the ceding schemes with one follow up call to ensure they have received everything and are starting the transfer process. Please find the attached emails and the 2 documents sent to you on 12th June. I also sent you a reminder again of the process & costs on 22nd June.

I can not give you an estimate of what the chaser costs will be. Some companies are very quick and others are not so... I already informed you of Scottish Widows having a backlog due to others we are dealing with. You are more than welcome to help chase your transfers as much as possible, or even to take over from here with chasing them and if you require any further assistance you can let me know.

We are here to help and support as much or as little as you wish. In many cases we do the chasing together. It is better because the companies can see the member is also involved. You do need to inform me when you correspond with them so I move my chasing dates further on. We always advise the client of the correspondence and updates we have with the ceding schemes.

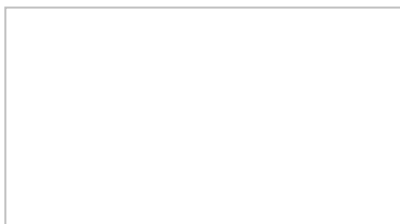
Please pay the outstanding invoice as soon as possible. If it remains outstanding we are unable to assist you further with the transfer process until the balance is settled.

**If you have any further questions please do not hesitate to contact me back.**

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](mailto:lisa@retirement.capital)

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On Tue, 25 Jul 2023 at 13:48, Derek Abram <[derek@dba-hrsolutions.com](mailto:derek@dba-hrsolutions.com)> wrote:

Hi Lisa,

Has Deirdre had the form intended for Wesleyan sent back to her as yet? If not, the application process is incomplete.

Please send me an estimate of the further costs you believe may be necessary for the completion of the transfers and what individual tasks remain to be completed within the overall process.

Best regards

Derek Abram

Sent from [Outlook for Android](#)

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**From:** Lisa Welton <[lisa@retirement.capital](mailto:lisa@retirement.capital)>

**Sent:** Tuesday, July 25, 2023 11:52:56 AM

**To:** Derek Abram <[derek@dba-hrsolutions.com](mailto:derek@dba-hrsolutions.com)>; Deirdre Abram <[deirdre@dba-hrsolutions.com](mailto:deirdre@dba-hrsolutions.com)>

**Cc:** Vikki Whitby <[vikki@retirement.capital](mailto:vikki@retirement.capital)>; Veronica Walkman <[veronica@retirement.capital](mailto:veronica@retirement.capital)>

**Subject:** Re: Invoice - INV-000071 from RC Administration Limited - Sent Using Zoho Books

Morning Derek & Deirdre

Vikki is correct this invoice is for the work carried out on the four transfer packs sent and the initial follow up contact with your ceding schemes as is it is stated in the transfer pack.

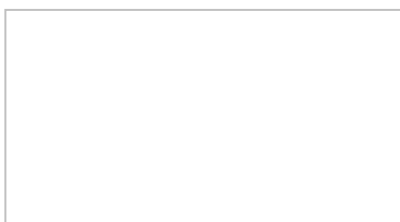
Any continuous corresponding work and chasing is calculated at the end of the transfer once the funds are in and your transfers are completed.

Please can you pay the invoice as soon as possible.

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.



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On Tue, 25 Jul 2023 at 09:44, Vikki Whitby <[vikki@retirement.capital](mailto:vikki@retirement.capital)> wrote:

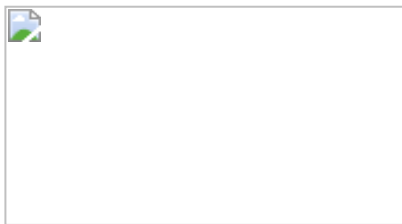
Hi Derek,

The invoice we have sent is for the administration work done up to the point of applying for the transfer, therefore the invoice is due for payment.

Any work done after application, is chargeable at an hourly rate (as specified in the transfer pack that Lisa would have sent). This is invoiced at the end of the transfer process.

Kind Regards  
Vikki Whitby  
Accounts Department

Please note that my usual working hours are 8.30-13.00 Monday-Thursday and 8.30-11.30 Friday.



Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: [vikki@retirement.capital](mailto:vikki@retirement.capital)

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On Tue, 25 Jul 2023 at 08:36, Derek Abram <[derek@dba-hrsolutions.com](mailto:derek@dba-hrsolutions.com)> wrote:

Hi Vikki,

The process of transferring funds is not yet complete. Once it is completed, I will pay the invoice.

Best regards

Derek Abram.

Sent from [Outlook for Android](#)

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**From:** Vikki Whitby <[vikki@retirement.capital](mailto:vikki@retirement.capital)>

**Sent:** Tuesday, July 25, 2023 8:27:08 AM

**To:** Derek Abram <[derek@dba-hrsolutions.com](mailto:derek@dba-hrsolutions.com)>; Deirdre Abram <[deirdre@dba-hrsolutions.com](mailto:deirdre@dba-hrsolutions.com)>

**Subject:** Fwd: Invoice - INV-000071 from RC Administration Limited - Sent Using Zoho Books

Hi Derek and Deirdre,

I hope all is well with you.

The attached invoice for Abram Pension Plan SSAS is outstanding, if you believe that the invoice has been paid, please can you provide the payment date.

If the invoice has not been paid, please can you arrange immediate payment or call me with any queries.

Kind Regards

Vikki Whitby

Accounts Department

Please note that my usual working hours are 8.30-13.00 Monday-Thursday and 8.30-11.30 Friday.



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----- Forwarded message -----  
From: **Data Files** <[data@retirement.capital](mailto:data@retirement.capital)>  
Date: Tue, 25 Jul 2023 at 08:20  
Subject: Fwd: Invoice - INV-000071 from RC Administration Limited - Sent Using Zoho Books  
To: Vikki Whitby <[vikki@retirement.capital](mailto:vikki@retirement.capital)>

----- Forwarded message -----  
From: **Retirement Capital** <[message-service@sender.zohobooks.com](mailto:message-service@sender.zohobooks.com)>  
Date: Tue, 18 Jul 2023 at 14:17  
Subject: Invoice - INV-000071 from RC Administration Limited - Sent Using Zoho Books  
To: <[derek@dba-hrsolutions.com](mailto:derek@dba-hrsolutions.com)>, <[deirdre@dba-hrsolutions.com](mailto:deirdre@dba-hrsolutions.com)>  
Cc: <[data@retirement.capital](mailto:data@retirement.capital)>, <[lisa@retirement.capital](mailto:lisa@retirement.capital)>

Invoice #INV-000071

Dear Abram Pension Plan SSAS,

Please find attached your Transfer Administration fee invoice. We would be grateful if you could arrange payment at your earliest convenience. Your invoice can be viewed, printed and downloaded as PDF from the link below.

INVOICE AMOUNT	
£1,400.00	
Invoice No	INV-000071
Invoice Date	18/07/23
Due Date	18/07/23

[VIEW INVOICE](#)

Thank you for choosing our services.

Please phone us on 0330 311 0088 should you have any queries regarding this service and invoice.

You can also email our Credit Control Manager, Vikki Whitby, in case of any queries:  
[vikki@retirement.capital](mailto:vikki@retirement.capital)

Accounts Team  
Retirement Capital

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**7 attachments**

**F1A71C32FA9D4E88A3CA39ED1DC7CD9E[77063].jpg**  
3K



**BF417B44AA324D1E86468B875C5B7D32[77062].jpg**  
7K



**9026FF031C9E4581A2AD407D585AB62F[77064].jpg**  
3K



**00. Retirement.Capital Mail - Re\_ Transfers into Abram Pension Plan SSAS.pdf**  
182K



**2nd reminder Retirement.Capital Mail - Re\_ Transfers into Abram Pension Plan SSAS.pdf**  
203K



**02. transfer process in 5 Steps.pdf**  
149K



**01. Transfer Pack SSAS.pdf**  
784K