



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

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**Fwd: information needed UKT-432789 & UKT-432817**

1 message

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**miro sroka** <mirosroka@gmail.com>  
To: Lisa Welton <lisa@retirement.capital>

18 September 2023 at 00:16

Hi Lisa,

Please see email below sent to Aegon with all the attached documents. Shall I send them the |August payslips and statements as well?

Best,  
Miro

----- Forwarded message -----

From: **miro sroka** <mirosroka@gmail.com>  
Date: Sun, 17 Sept 2023 at 23:14  
Subject: Re: information needed UKT-432789 & UKT-432817  
To: Claims Vetting Team MB <claimsvettingteam@aegonservicing.co.uk>

Good evening team,

Please see the attached questionnaire and supporting documents for the transfer of both of my policies.

Please let me know when I can expect the funds to be transferred?

Many thanks,  
Miro

On Mon, 28 Aug 2023 at 11:08, Claims Vetting Team MB <claimsvettingteam@aegonservicing.co.uk> wrote:

Our reference: UKT-432789 & UKT-432817

Good Morning,

**Your transfer out request- questionnaire completion request**

We've received a request from RC Administration Limited to transfer your Aegon pension funds to the Akors SSAS. Please complete for both plans.

Government regulations introduced from November 2021 require conditions to be satisfied before we can approve and complete your transfer.

These safety checks are to help protect you from pension scams and are important to help keep your savings safe. It may mean that it takes a little longer for us to complete your transfer.

Having completed the initial checks required of us under The Pension Schemes Act 2021, we identified that we need additional information to allow the transfer to proceed.

To protect your interests and to allow us to better understand the circumstances of this transfer we ask that you complete the enclosed **UK transfer questionnaire**- please complete and return it to us at the address shown below or alternatively reply to this email.

Aegon Scottish Equitable Pensions and Bonds  
Sunderland  
SR43 4DS

We've also attached The Pension Regulator's and Financial Conduct Authority's Scams leaflet, which explains the dangers of pension scams and what you should do to protect yourself.

If you have any questions about this, please contact your financial adviser if you have one or call us on 03456 10 00 10

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call us or visit [aegon.co.uk/onlineform](https://aegon.co.uk/onlineform)

Kind regards,

 Atos logo

**Lana Saunderson**  
Customer Service Representative – Claims 1 (NIGO)  
AEGON Existing Business– Edinburgh  
[atos.net](https://atos.net)  
 BTS banner



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If you email us, we may keep a record of your name and email address. We protect our system from malicious software and viruses and recommend you do the same.

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#### 13 attachments



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3K



image002.png  
62K



image003.png  
57K



image002.png  
62K



image001.png  
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image003.png  
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05. Payslip May June July 2023 -Miro.pdf  
89K



04. Scheme Rules 2022.pdf  
173K



01. Completed Questionnaire 8801030.pdf  
334K



03. Trust Deed - Akors SSAS.pdf  
685K



02. Completed Questionnaire 8163166.pdf  
553K



06. Miro Statement--601711-86301373--13-05-2023-13-06-2023.pdf  
212K



07. Miro Statement--601711-86301373--14-06-2023-13-07-2023.pdf  
276K