



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

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**RE: [] Re: Edward Brunt Transfer out request**

1 message

**Vanguard Personal Investors** <Personalinvestors@vanguard.co.uk>

10 February 2023 at 12:08

To: "lisa@retirement.capital" &lt;lisa@retirement.capital&gt;, Edward Brunt &lt;eddieharold@hotmail.co.uk&gt;

Cc: "Edbrunt@actioncoach.co.uk" &lt;Edbrunt@actioncoach.co.uk&gt;

Hi Both,

Thank you for your email.

Please note that this case has been passed onto the relevant team.

Regards,

Callum

Personal Investor Services

----- Original Message -----

**From:** lisa@retirement.capital;**Received:** Fri Feb 10 2023 08:05:09 GMT+0000 (Greenwich Mean Time)**To:** Edward Brunt <eddieharold@hotmail.co.uk>;**Cc:** Personal Investors Mailbox <personalinvestors@vanguard.co.uk>; Edbrunt@actioncoach.co.uk;**Subject:** [External] Re: Edward Brunt Transfer out request

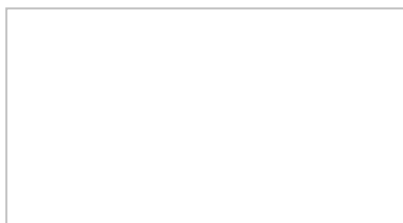
Good morning Ed,

Thank you for the information.. Please keep me updated. I have attached again the email received by Vanguard for Callum's records.

Kind Regards,

Lisa

My working hours are 8.00-14.00 Monday- Friday.

Web. <https://retirement.capital> [retirement.capital]

Phone: 0330 311 0088

Email: lisa@retirement.capital

Data Processing Centre

Retirement.Capital

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On Thu, 9 Feb 2023 at 18:02, Vanguard Personal Investors <[Personalinvestors@vanguard.co.uk](mailto:Personalinvestors@vanguard.co.uk)> wrote:

Hi Edward,

Thank you for your message.

Apologies for any confusion that may have been caused.

I will contact you directly through your Vanguard account as we are unable to discuss account information such as transfers via email.

Regards,

Callum  
Personal Investor Services

----- Original Message -----

**From:** Edward Brunt <[eddieharold@hotmail.co.uk](mailto:eddieharold@hotmail.co.uk)>;

**Received:** Thu Feb 09 2023 15:05:22 GMT+0000 (Greenwich Mean Time)

**To:** Personal Investors Mailbox <[personalinvestors@vanguard.co.uk](mailto:personalinvestors@vanguard.co.uk)>; [Edbrunt@actioncoach.co.uk](mailto:Edbrunt@actioncoach.co.uk);  
[lisa@retirement.capital](mailto:lisa@retirement.capital);

**Subject:** [External] Re: Edward Brunt Transfer out request

Hi Lisa,

Please see latest message from vanguard.

We seem to be going around in circles here, i requested first they told me i needed to get you to request, you request and they tell you i need to do, i do it again and they get back to me saying you need to do it.

Not sure where the issue is but something is going wrong somewhere.

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**From:** Vanguard Personal Investors <[Personalinvestors@vanguard.co.uk](mailto:Personalinvestors@vanguard.co.uk)>

**Sent:** 27 January 2023 15:27

**To:** Edward Brunt <[eddieharold@hotmail.co.uk](mailto:eddieharold@hotmail.co.uk)>

**Subject:** RE: Edward Brunt Transfer out request

Dear Edward,

Thank you for your message.

I can confirm that if you do hold an account with you are able to view your email address via the My Profile tab, as this would hold all your details.

As per my colleague's information, if you wish to transfer some or all of your assets out of Vanguard, this is something we can facilitate, we aim to be as flexible as we can with your requests.

However, this is subject to the receiving provider's terms and conditions as some other providers will not accept partial transfers to be sent to them. For this reason, we recommend speaking to your new provider directly to get an understanding of the types of transfer they can accept.

Once you are clear on what you would like to transfer out, please submit the request via your new provider, they will contact us directly to arrange the transfer of assets and/or cash.

If you do wish for any account specifics or update on your transfer, please ensure you contact us via the phone or use the secure message option in your account moving forward.

I hope this helps and clarifies. If you have any further queries, please feel free to contact us.

Kind regards

Shemar  
Personal Investor Services

----- Original Message -----

**From:** Edward Brunt <[eddieharold@hotmail.co.uk](mailto:eddieharold@hotmail.co.uk)>;

**Received:** Thu Jan 26 2023 15:19:14 GMT+0000 (Greenwich Mean Time)

**To:** Personal Investors Mailbox <[personalinvestors@vanguard.co.uk](mailto:personalinvestors@vanguard.co.uk)>; [Edbrunt@actioncoach.co.uk](mailto:Edbrunt@actioncoach.co.uk);  
[isa@retirement.capital](mailto:isa@retirement.capital);

**Subject:** [External] Edward Brunt Transfer out request

Hi,

I have been asked to contact you from my personal email address to arrange the transfer out of my funds as per attached.

I did ask via your online secure messages if i could do this and someone from your team told me i needed my new provider to get in touch to sort so not sure where the breakdown in communication is coming from but there is mixed info from your end.

Hopefully this is all you need let me know if you need anything else.

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