

RE: Transfer Out - Edward Brunt , Vanguard SIPP Account Number: VG0407710

To Vanguard.PensionAdmin@fnz.co.uk <vanguard.pensionadmin@fnz.co.uk> Copy
Vanguard Personal Investors <personalinvestors@vanguard.co.uk> •
edbrunt@actioncoach.co.uk <edbrunt@actioncoach.co.uk> Blind copy
lisa@retirement.capital <lisa@retirement.capital> • georginam@retirement.capital <georginam@retirement.capital>

Good morning Transfers Team,

Policy Number: **VG0407710**
Plan Holder: **Edward Brunt**
NI: **JH260270C**

Please can you issue transfer discharge forms for the above named client, Edward Brunt.

Please find attached transfer in request form for the discharge forms and email from Personal Investor Declan confirming to send the transfer request to this email. We await the discharge papers to be able to start the process.

Kind regards
Lisa Welton

RC Administration Limited

Phone: 0330 311 0839

1A Park Lane
Poynton
Cheshire
SK12 1RD

Company Number: 12409200

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On 09/01/2023 17:30 CET Vanguard Personal Investors <personalinvestors@vanguard.co.uk> wrote:

Good afternoon Lisa,

I hope you are well.

Thank you for getting in touch. We're unable to accept third party request as such, can I kindly ask you the client to arrange to initiate a transfer via their personal account please.

If our client would like assists with submitting the transfer, can you kindly ask them to contact us via secure message and we'll provide the relevant steps to be this setup.

Sorry I wasn't able to help much with your initial request but please let me know if you have any questions on the above.

Many thanks,
Nathan

UK Personal Investor

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

From: info@rcadministration.com;

Received: Mon Jan 09 2023 12:13:14 GMT+0000 (Greenwich Mean Time)

To: Personal Investors Mailbox <personalinvestors@vanguard.co.uk>;

Subject: [External] Transfer Out - Edward Brunt , Vanguard SIPP Account Number: VG0407710

Dear Sir/Madam,

Vanguard SIPP Account Number: VG0407710 SIPP Account Holder: Mr. Edward Harold Brunt

We would like to request a Transfer Out on behalf of Mr. Edward Brunt of the above policy to a SSAS called Edward Brunt SSAS.

Additionally, you may find attached a signed copy of the transfer request form completed by Mr. Brunt together with the signed Trust Deed, Scheme Rules, the SSAS Bank Account Details and a confirmation letter of the registration of the SSAS from HMRC.

The Scheme was opened on 16/09/2022 and the Pension Scheme Tax Reference number is 20006642RE. I would be most grateful if you may process Mr. Edward Brunt's request at your earliest convenience.

Should you have any queries or require any additional information, please notify me accordingly.

Kind regards
Lisa Welton

RC Administration Limited

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- 1. Transfer in form - Edward Brunt SSAS.pdf (1 MB)
 - 21.04.23 Retirement.Capital Mail - Re_ Edward Brunt Transfer out request.pdf (401 KB)