

RE: Transfer delay - NZ776415D ECON E3900002R / SCON S2700145L
Mandy Edwards - Edward SSAS

To Steph King <steph.king@devon.gov.uk> Copy Mandy Ingram <mandy.ingram1812@gmail.com> Blind copy
lisa@retirement.capital • Rich@randrdevon.co.uk <rich@randrdevon.co.uk>

Good afternoon Steph,

I have just called in for an update on this transfer and I spoke to Nicky. She advises there is nothing pending that she can see in the system on this transfer case since November 2022.

I was previously advised last week that you were on annual leave until 1 Nov so I called in today assuming you would be catching up yesterday after your leave, today I was told you work Mon, Tues & Wed.

Please can you kindly advise an update on this case as no one else seems to know about anything since November 2022.

Mandy sent in the requested account details to you on 13 October in reply to your request. Please find attached the email & also the confirmation of the account details from Metro bank.

Please can you advise what stage this transfer is at and if you require any additional information to action this transfer request.

Her unique reference number from the money helper (Pension Wise) appointment: Is **831034/281122** attended 28 November 2022. Booking reference number: **649430** for the purpose of this transfer.

We look forward to hearing from you at your earliest convenience.

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 16/10/2023 08:29 BST info@rcadministration.com wrote:

Good morning Steph,

Mandy has requested I respond to you with the information you requested.

The name of the Pension is called "Edwards SSAS" please find attached trust deed. This is a small self administered scheme. We are administrators of the SSAS, therefore FCA is not a requirement we do not give financial advise.

Please find attached trust deed.

If there is anything more you require please advise.

Kind regards
Lisa Welton
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On 13/10/2023 09:39 BST Steph King <steph.king@devon.gov.uk> wrote:

Good Morning

A email was sent to Mrs Ingram on 3rd July requesting some further information but as yet we have not received a reply. We will need this information if Mrs Ingram wishes to go ahead.

Many thanks

Steph

Steph King

Pensions Technician

**Peninsula Pensions, Great Moor House, Bittern Road, Sowton Industrial Estate,
Exeter, EX2 7NL**

(Tel: 01392 38(3000) (ask for Pensions)

From 1st April 2022 all future LGPS member communications from Peninsula Pensions will be issued via our online portal [Member Self Service \(MSS\)](#), unless you were a member prior to 1st April 2015 and elect to opt out of the service. All documents relating to your pension and retirement will be viewable on the portal and **not issued by post**. Therefore, if you haven't signed up already, please register now using a personal email address instead of your work email address, which we recommend to ensure continued access to the service in the event of you leaving or changing employment.

Please view our '[frequently asked questions](#)' website page to find answers to questions that you may have and more information about the pension schemes that we administer.

Peninsula Pensions is not authorised to provide financial advice. If you require financial advice you should contact an Independent Financial Advisor (IFA). To find your nearest IFA check out the [MoneyHelper website](#) for a suitably qualified individual able to advise on Defined Benefit Schemes.

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www.peninsulapensions.org.uk/privacy



From: info@rcadministration.com <info@rcadministration.com>
Sent: 12 October 2023 09:25
To: Steph King <Steph.King@devon.gov.uk>; pensions@devon.gov.uk
Cc: Mandy ingram <mandy.ingram1812@gmail.com>
Subject: Re: Transfer delay - NZ776415D ECON E3900002R / SCON S2700145L Mandy Edwards - Edward SSAS

Dear Pensions transfers team,

Member : **Mandy Edwards**

Policy : **NZ776415D ECON E3900002R / SCON S2700145L**

Please can you give an update on this pension transfer out, we believe was in the final stages until the supplied a letter of delay on 20th April 2023 (your email below).

It would appear that they have now released transitional guidance. And that you should be able to provide a figure now for the final transfer amount. Please can you provide an update on this transfer case.

I have tried to call for an update but, am unable to get through to anyone until after 12pm according to the machine recording.

Kind regards,

Lisa Welton
RC Administration Limited

Phone: 0330 311 0839

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Poynton
Cheshire
SK12 1RD

Company Number: 12409200

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On 20/04/2023 10:19 BST Steph King <steph.king@devon.gov.uk> wrote:

Dear Mrs Edwards

Please find attached a letter explaining delays we currently have with processing transfers.

Kind regards

Steph

Steph King

Pensions Technician

**Peninsula Pensions, Great Moor House, Bittern Road, Sowton Industrial Estate,
Exeter, EX2 7NL**

(Tel: 01392 38(3000) (ask for Pensions))

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- 13.10.23 Account confirmation Retirement.Capital Mail - M.E pension transfer.pdf (164 KB)
- METRO BANK EDWARDS SSAS.pdf (154 KB)
- image001.jpg (15 KB)
- image002.jpg (13 KB)
- image003.jpg (4 KB)
- image004.png (11 KB)