

Mrs Lisa Jones  
Marchants Barn  
Little Park Farm  
Marchants Close  
Hurstpierpoint  
Hassocs  
West Sussex BN6 9UZ

Clare Neville-Dove  
American Express UK Pension Plan  
Administered by Conduent HR Services  
Building 12, Unit D  
Vantage Point Business Village  
Mitcheldean  
Gloucestershire GL17 0DD

07 February 2018

By 1<sup>st</sup> Class Recorded Post

Dear Clare,

**Elljess Investments Ltd Executive Pension Scheme – Mrs Lisa J Jones**  
**Your Ref: Amex / 55802**  
**National Insurance Number: NA373920B**  
**Date of Birth: 16 October 1962**

Please accept this letter as my authority for American Express UK Pension Plan Administered by Conduent HR Services to proceed with the transfer of the above policy as a matter of urgency to Elljess Investments Ltd Executive Pension Scheme, administered by Registered Scheme Administrator, Vancouver House, 111 Hagley Road, Edgbaston, Birmingham B16 8LB.

I confirm that Registered Scheme Administrator is a co-signatory to the pension scheme bank account and that I cannot remove them.

I can confirm that I am not using this pension scheme for pension liberation.

Please deal directly with Registered Scheme Administrator on my pension transfer going forward.

Please may this transfer be resolved as a matter of urgency. It is unacceptable that we have been chasing for months.

Yours Sincerely



Mrs Lisa Jones

The transfer payment should be made by BACS to the following account details:-

**Name of Bank: AIB (Allied Irish Bank)**

**Account Name: Elljess Investments Ltd Executive Pension Scheme**

**Account Number: 04919088 / Sort Code: 23-83-96**

**IBAN – GB87AIBK23839604919088 / BIC – AIBKGB2L**

**Payment Reference: ELLJESSINVEST-AMEX**

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

Yours Sincerely

A handwritten signature in black ink that reads "Lisa Jones". The signature is written in a cursive style, with the first letters of each word being capitalized and prominent.

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**Elljess Investments Ltd Executive Pension Scheme – Mrs Lisa J Jones**

**Your Ref: Amex / 55802**

**National Insurance Number: NA373920B**

**Date of Birth: 16 October 1962**

Further to your letter dated 22<sup>nd</sup> January 2018 to Registered Scheme Administrator, received 29<sup>th</sup> January 2018, I can confirm the following:

1. Registered Scheme Administrator wrote to American Express 13<sup>th</sup> December 2017, following your letter dated 6<sup>th</sup> December 2017, providing you with the HMRC registration details of the receiving scheme.
2. Registered Scheme Administrator wrote to American Express 30<sup>th</sup> January 2018, confirming that they had written to HMRC to rescind their letter to you dated 19<sup>th</sup> September 2017.
3. Registered Scheme Administrator have chased HMRC on numerous occasions.
- ~~4. Registered Scheme Administrator verbally spoke to Sarah McKenzie from HMRC on the 6<sup>th</sup>~~  
February 2018, HMRC stated that they are not allowed to communicate with Registered Scheme Administrator with regards to this transfer. HMRC stated that it is American Express who must request in writing to HMRC to rescind their letter to you dated 19<sup>th</sup> September 2017.

Please will you write to HMRC immediately requesting HMRC to rescind their letter dated 19<sup>th</sup> September 2017. Please can you copy this letter to myself (my address above) and Registered Scheme Administrator, Vancouver House, 111 Hagley Road, Edgbaston, Birmingham B16 8LB. Please notify myself and Registered Scheme Administrator as soon as you receive a response from HMRC.

Please may this transfer be resolved as a matter of urgency. It is unacceptable that we have been chasing for months.