


From: Merle Oper merle@pensionpractitioner.com 
Subject: Re: Drawdown etc.
Date: 11 October 2018 at 11:49
To: Richard Fillan richard@fillans.co.uk

MO

Dear Richard,

First of all belated birthday wishes, 55 is a nice number!

We can process any drawdown requirements, we have in house pension payroll set up to deal with all such requests. Before we go down that road, please read and complete the attached form so that we know how you wish to go about accessing your pension benefits.

As we don't provide any financial advice, and you wish to discuss whether you want to access the pension pot or leave it invested, we would recommend you to contact your financial adviser in relation to that.

Any questions, please don't hesitate to ask.

Kind regards,

Merle Oper
Head of Operations

Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

T: 0800 634 4862
F: 020 8906 6611



Benefit Payment
Form.pdf



Pension Practitioner is a tradestyle of The Practitioners Partnership LP

Registered Number: 00159

Registered Office: 1st Floor, World Trade Centre, Baytree Road, Gibraltar GX11 1AA

IMPORTANT - PLEASE NOTE The information transmitted is intended only for the person or entity to which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of or taking of any action in reliance upon this information by persons or entities other than the intended recipient is prohibited. If you received this in error please contact the sender and destroy this email.

On 11 Oct 2018, at 11:30, Richard Fillan <richard@fillans.co.uk> wrote:

Hi Merle

Now I'm 55(!), who should I be speaking to about my options regarding tax free lump sums/drawdown etc., from my Pension Scheme?

Would it be you, or the pensions guy at Sheards who introduced me to PensionPractitioner in the first place?

Regards
Richard

Richard Fillan
Managing Director
Fillans & Sons Ltd