

RE: Aegon Pension Transfer out request - Acc 20\*\*\*\*54 Plan 71\*\*\*\*37  
Andrew Jannetta - HMF Investment Trust SSAS

To info@rcadministration.com

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Good afternoon,

We can confirm we have received the email from the client.

Kind Regards,

**Craig Black**

Platform Administrator – Money Out

Digital Solutions

[AEGON](#) UK

We've made a number of changes to make it easier to do business with us online and to get your queries answered quickly. If you have a query or wish to place an instruction with us please visit our [Support & Contact](#) pages for further information.



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**From:** [info@rcadministration.com](mailto:info@rcadministration.com) <[info@rcadministration.com](mailto:info@rcadministration.com)>

**Sent:** Monday, October 23, 2023 11:55 AM

**To:** My Pensions <[my.pension@aegon.co.uk](mailto:my.pension@aegon.co.uk)>; Referrals <[referrals@aegon.co.uk](mailto:referrals@aegon.co.uk)>; Transfers Out <[transfersout@aegon.co.uk](mailto:transfersout@aegon.co.uk)>

**Cc:** [andrew@hmfconsultancy.co.uk](mailto:andrew@hmfconsultancy.co.uk)

**Subject:** Re: Aegon Pension Transfer out request - Acc 20\*\*\*\*54 Plan 71\*\*\*\*37 Andrew Jannetta - HMF Investment Trust SSAS

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Dear Pensions transfer team,

Client name: **Andrew Jannetta**

Retiree Account number : **20\*\*\*\*54**

Retiready Pension plan number : **71\*\*\*\*37**

I have spoken today to Roshan who advised an email was sent to member on 05/10 & again on 12/10 email. I was advised that a response was not yet received from the member and that you are still awaiting the response.

Please find attached a copy of the email response to you from Andrew Jannetta responding to your email on 12th October. I am sure you will find this in your system.

Please can you log this in your system and continue your transfer process as soon as possible and please can you update with confirm receipt of this.

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 04/09/2023 10:37 BST [info@rcadministration.com](mailto:info@rcadministration.com) wrote:

Dear Pensions Transfer Team,

Client name: **Andrew Jannetta**

Retiready Account number : **20\*\*\*\*54**

Retiready Pension plan number : **71\*\*\*\*37**

Please find attached a completed application from Andrew Jannetta to transfer his pension out, together with the below listed documents. These have also been posted to you.

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. HMRC Tax Registration Letter
5. HMRC Screen shot
6. Company Contribution Schedule
7. Company Employment Letter
8. 3 Months Personal Bank Statement Jun Jul Aug 2023
9. 3 Months Payslips Jun Jul Aug 2023
10. Authority Letter
11. SSAS Metro Statement
12. SSAS Metro Bank account details
13. Passport copy
14. Members Guide
15. Cover Letter

I would be most grateful if you may process Mr. Jannetta's request at your earliest convenience. Should you require any further information, please do not hesitate to contact us.

Kind regards

Lisa Welton

RC Administration Limited

Phone: 0330 311 0839

1A Park Lane  
Poynton  
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SK12 1RD

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- image002.png (3 KB)
- image003.png (3 KB)
- image004.png (3 KB)