

From: PENS70
Sent: 06 August 2021 11:58
To: info@rcadministration.com
Subject: FW: Pension Transfer Request

Hi

Further to my email below, we are still awaiting a response from you.
We cannot proceed any further with the transfer request until we have received the information request in my email below.

Can you please arrange for the requested information to be emailed to us ASAP.

If there are any problems let me know.

Thanks

Nicola Oldale | Customer Adviser

✉ Aviva, PO Box 520, Norwich, NR1 3WG

☎ Call us on 0800 056 3432 (Mon-Fri, 8am-6pm)

✉ Send emails to pensr70@aviva.com



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Aviva: Confidential

From: PENS70
Sent: 30 July 2021 10:14
To: 'info@rcadministration.com' <info@rcadministration.com>
Subject: Pension Transfer Request

FAO Esther Salmon

Plan number - 30773541AR

Plan holder – Mr Stephen Heath

We have received your request to transfer Mr Heath's pension funds to the Joel 2 vs25-27 Pension Scheme, administered by you.

In order to complete our due diligence checks before effecting this transfer, could you please supply the following documentation in respect of the receiving scheme?

- The Scheme's establishing Deed
- Any subsequent amending Deed(s)

- The Scheme Rules
- A recently dated printout of the full Scheme details as held by The Pensions Regulator
- A recently dated printout of the full Scheme details as held by HM Revenue and Customs

Where legal documents are requested, please ensure you send a copy of the fully executed document.

We're happy to receive these by return email to this address. Alternatively, you can post them to:

Aviva
PO Box 520
Norwich
NR1 3WG

If posting, please ensure Mr Heath's Aviva plan number is clearly marked on your cover letter to prevent any delays reaching our team.

I'd be grateful if you could provide an estimated timescale for returning the information requested. If we don't hear from you by 30 August 2021 we won't be able to consider the request any further and will close our file.

If there are any problems let me know.

Thanks

Nicola Oldale | Customer Adviser

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