



Esther Salmon <esther@retirement.capital>

Fwd: URGENT - FAO: Kelly Hynes (Joel 2 vs25-27 Pension Scheme - Fidelity Funds Network)

1 message

T Theodore-Heath <ukhomeguardians@gmail.com>

7 April 2021 at 12:24

To: info@fil.com

Cc: Esther Salmon <esther@retirement.capital>

FAO:

KELLY HYNES (or TO WHOM IT MAY CONCERN)

Reference No: **W738825-16SEB21**

Plan No: D1139084000

Policy Holder: Stephen Christopher Heath

Customer Ref: 1002376279

Hello Kelly,

Further to our telephone conversation a short while ago, I hereby attach (as a short email trail) some of the previous correspondence referred to during our conversation.

As stated, I wish to transfer the funds held with Fidelity (Standard Life) into a SSAS, which is administered by Retirement Capital (Esther Salmon - copied-in).

If you require anything further please do not hesitate to contact me at this email address or on 07592 715434 - by the way, Trisha, identified in one of the email's below, is my wife.

Finally, I would be grateful if I could receive an acknowledgement of your receipt of this email.

I thank you for your attention and look forward to your response,

Yours truly,

Stephen Heath

Begin forwarded message:

From: Stephen Heath <mail4stephenheath@gmail.com>**Subject:** Fwd: Joel 2 vs25-27 Pension Scheme - Fidelity Funds Network**Date:** 17 March 2021 10:43:51 GMT**To:** info@fil.com**Cc:** esther@retirement.capital**URGENT**

For the Attention of:

LOUISE BARR

Dear Louise,

Further to our telephone conversation today, I attach the correspondence referred to during our discussion.

I look forward to receiving an update from you shortly and an expedient 'resolution' to this matter. I would be grateful if you would liaise with Standard Life (Plan No D1139084000) as a matter of urgency!

I would also encourage you to speak directly with Esther Salmon of Retirement Capital, so that we can have this matter finally resolved and funds transferred over to Retirement Capital.

I thank you for your attention and look forward to your response,

Stephen Heath

Begin forwarded message:

From: Esther Salmon <esther@retirement.capital>
Subject: Joel 2 vs25-27 Pension Scheme - Fidelity Funds Network
Date: 16 March 2021 10:54:32 GMT
To: Trisha Heath <mail4trishaheath@gmail.com>
Cc: Liam Hillier <investments@opportunity10.co.uk>

Dear Trisha,

I hope you are well.

Please find attached the letter that was originally sent to Fidelity. When I spoke to Fidelity at the time, they said for me to simply write in to get the ball rolling. I have chased them and now they are passing me from pillar to post, and now they will not speak to me because I am not your adviser. They are making life very painful. I called them again this morning and held for 18 minutes, then it finally went to a ring tone and no one answered.

Is there anyway at all that Stephen can explain to them that I am simply the administrator to the scheme, and can they email him the relevant form that needs to be completed?

Is it stocks within the Fidelity Funds Network?

Have you or Stephen heard back from any other of the transfer providers?

On a separate note, I have spoken to ii for the investment account. They have asked for an LEI number for an account with two members or more. I can arrange for this, we have an account with the London Stock Exchange. The price is approximately £115 plus vat. The cost is direct from London Stock Exchange and not from us. Let me know if you are happy to proceed.

I will send the docusign email with the appointment of an independent trustee this morning.

Thanks Trisha.

Kind Regards

Esther Salmon
Administrator

Retirement
.Capital



Web: <https://retirement.capital>
Phone: 0330 311 0088
Email: esther@retirement.capital

Data Processing Centre
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4/16/2021

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Cover Letter Fidelity Funds Network Stephen 06.01.2021.pdf
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