



Esther Salmon <esther@retirement.capital>

Re: Pensions - URGENT

Trisha Heath <ukhomeguardians@gmail.com>
To: Esther Salmon <esther@retirement.capital>
Cc: Liam Hillier <investments@opportunity10.co.uk>

6 April 2021 at 14:06

Good afternoon Esther

We have spoken with two of Stephen's pension providers this morning: Scottish Friendly and Sanlam.

1. We note that the Sanlam pension transfer documents were sent to the wrong address.

The actual address should have been:

SANLAM UK

1 Temple Quay

1 Temple Back East

Bristol

BS1 6DZ

Therefore, please ensure that the original documents are sent by recorded / signed for delivery to the above address only.

2. We note that the pension plan number for Scottish Friendly also appears to be wrong on the transfer documents.

It should be: **R1337804** and not as per your previous correspondence.

Therefore, please can the covering letter be redrafted with the correct policy number before being sent.

3. I also note that for my Pura Group Supplementary (COMP) Pension you refer to it on documentation as having a plan number of: 00696485RD. I have never seen this number, and only refer to it by plan number: 54582. Please use this number in your correspondence to the LANCING address.

I hope you get this email before the documents are sent.

If not, please advise immediately and we will send the fresh signatures to you again by next day delivery to avoid any further delay.

Many thanks
Trisha

On 26 Mar 2021, at 15:07, Trisha Heath <ukhomeguardians@gmail.com> wrote:

Dear Esther

I hope you are well.

Today I will be posting to Retirement Capital by recorded delivery, copies of all my and Stephen's pension documents that you sent us electronically.

We have copied the signature pages and put fresh signatures on them.

We have sent them back to you so that you can post them again to the pension companies. Please include your own fresh signatures and send them by recorded delivery so they cannot say they did not receive them.

I have already contacted prudential and they gave me the emails to send the scanned documents to:

For the 54582 plan it is. dbmpp@prudential.co.uk

For the B612R195 plan it is: support.sch@prudential.co.uk

They still require documents with original signatures but will open the transfer file based on the email while waiting for the originals.

Please note that the address to send both Prudential pensions to is:

Prudential
LANCING
BN15 8GB

We will be contacting Stephen's other pension providers and keep you updated.

Many thanks
Trisha

On Monday, March 22, 2021, Esther Salmon <esther@retirement.capital> wrote:

Thanks Trisha, received safely.

Kind Regards

Esther Salmon
Administrator

Retirement
.Capital



Web. <https://retirement.capital>
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Email: esther@retirement.capital

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On Tue, 16 Mar 2021 at 22:10, Trisha Heath <ukhomeguardians@gmail.com> wrote:

Hi Esther

Thanks.

We have signed the forms.

Trisha

On 16 Mar 2021, at 14:11, Esther Salmon <esther@retirement.capital> wrote:

Hi Trisha,

I have just remembered that when the set up documents were sent to you and Stephen last year via docusign, you did not receive them.

Just checking that you both received the docusign safely today and if not, would you like me to send to a different address? The addresses the docusign has been sent to are:

mail4stephenheath@gmail.com
mail4trishaheath@gmail.com

Thanks Trisha.

Kind Regards

Esther Salmon
Administrator

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.Capital



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On Tue, 16 Mar 2021 at 13:39, Esther Salmon <esther@retirement.capital> wrote:
Hi Trisha,

The docusign email with deed of appointment has just been sent to Stephen to sign first, once Stephen has signed it, it will automatically send to you to sign.

Many thanks

Kind Regards

Esther Salmon
Administrator

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On Fri, 12 Mar 2021 at 17:51, Trisha Heath <ukhomeguardians@gmail.com> wrote:

Hi Esther

Thank you for your email.

Yes we are in agreement for this.

Many thanks
Trisha

On Friday, March 12, 2021, Esther Salmon <esther@retirement.capital> wrote:
Hi Trisha,

Sorry to trouble you, just a quick question with regards to the ii account. ii have requested a corporate trustee to be added to the pension scheme. We would normally charge a small one off fee of £250 to add RC Trustees to a pension scheme and ask you to kindly sign a deed of appointment and a delegation of investment resolution. We can send this to you via docusign for digital signature.

I can draw this up next week if you are in agreement. We will not charge you the £250 fee, apologies for the delay with the account.

Thanks Trisha and I look forward to hearing from you.

Kind Regards

Esther Salmon
Administrator

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On Thu, 11 Mar 2021 at 21:45, T Theodore-Heath
<ukhomeguardians@gmail.com> wrote:

Hi Esther

Thank you for this.

However, one of Stephen's pensions is missing.

The missing provider is: Standard Life Policy. Policy number: D1139084000

Managed by Fidelity Funds Network. Ref: 1002376279.

In addition, please can you send us the **Gemini crypto currency application forms** which we have been requesting since December.

We emailed the **Interactive Investors share account application forms to you on 23rd December** but are yet to hear anything regarding the opening of this account. Please can you get back to us regarding these as a matter of urgency.

Many thanks
Trisha Heath

PI

On 11 Mar 2021, at 16:36, Esther Salmon <esther@retirement.capital> wrote:

Dear Liam and Trisha,

Please find attached the packs that have been sent to the various current providers for Stephen. Please accept my

apologies for the delay in sending these through.

Thank you so much for your patience.

Kind Regards

Esther Salmon
Administrator

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