

To: Catriona McPhee <catriona@stewartifa.co.uk>
Subject: RE: Retirement Account - Transfer out update

Classification: Limited

Hi Catriona,

Very well thank you and hope your well?

I spoke to the RA specialist and there is no request from the SASS provider via options asking us to transfer out the Retirement Account plan.

We need to be approached via options to get the ball rolling from the SASS provider

Kind regards,

Craig Buchanan | Business Development Account Manager – Individual Distribution

LP & I - Distribution | Scottish Widows Ltd Lloyds Banking Group
Tel: 0131 300 8013 | E-Mail: craig.buchanan@scottishwidows.co.uk

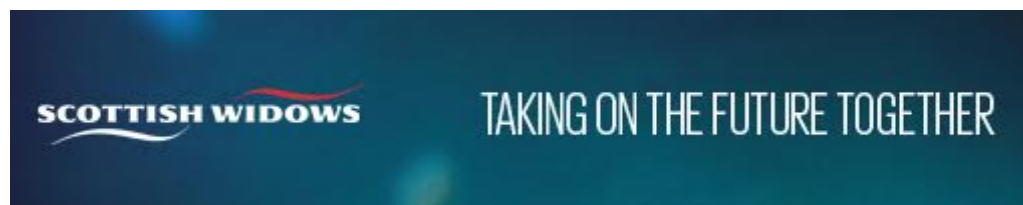
Follow me on LinkedIn for all the latest up-dates www.linkedin.com/in/craig-buchanan-ab014875

Retirement Account **0800 096 4364**

Protection **0345 030 6240**

Workplace **0345 850 1060**

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From: Catriona McPhee <catriona@stewartifa.co.uk>

Sent: 12 January 2023 15:43

To: Buchanan, Craig (SW Head Of Individua, Insurance & Wealth) <Craig.Buchanan@scottishwidows.co.uk>

Subject: FW: Fwd:

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Hi Craig

Hope you are well.

Do you have any update for the below?

Regards

Catriona McPhee

Administrator

Stewart IFA Ltd

Tel: 01505 610 005 | Fax: 01505 614 814

Email: catriona@Stewartifa.co.uk

Address: 5 Windsor Place, Main Street, Bridge of Weir, PA11 3AF | 1 Kirkinner Place, Main Street, Bridge of Weir, PA11 3AA



From: Catriona McPhee
Sent: 15 December 2022 09:29
To: Buchanan, Craig (SW Head Of Individua, Insurance & Wealth) <Craig.Buchanan@scottishwidows.co.uk>
Subject: RE: Fwd:

Hi Craig

Nicola's policy number is 41418735.

Regards

Catriona McPhee
Administrator
Stewart IFA Ltd

Tel: 01505 610 005 | Fax: 01505 614 814

Email: catriona@Stewartifa.co.uk

Address: 5 Windsor Place, Main Street, Bridge of Weir, PA11 3AF | 1 Kirkinner Place, Main Street, Bridge of Weir, PA11 3AA



From: Buchanan, Craig (SW Head Of Individua, Insurance & Wealth) <Craig.Buchanan@scottishwidows.co.uk>
Sent: 14 December 2022 16:43
To: Catriona McPhee <catriona@stewartifa.co.uk>
Subject: RE: Fwd:

Classification: Limited

Hi Catriona,

Do you have a plan or policy number specific to that client so we can determine the bespoke process and requirements for the transfer to the SASS

Thank you

From: Catriona McPhee <catriona@stewartifa.co.uk>

Sent: 14 December 2022 16:27

To: Buchanan, Craig (SW Head Of Individua, Insurance & Wealth) <Craig.Buchanan@scottishwidows.co.uk>

Subject: RE: Fwd:

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Great thanks.

Catriona McPhee

Administrator

Stewart IFA Ltd

Tel: 01505 610 005 | Fax: 01505 614 814

Email: catriona@Stewartifa.co.uk

Address: 5 Windsor Place, Main Street, Bridge of Weir, PA11 3AF | 1 Kirkinner Place, Main Street, Bridge of Weir, PA11 3AA



From: Buchanan, Craig (SW Head Of Individua, Insurance & Wealth) <Craig.Buchanan@scottishwidows.co.uk>
Sent: 14 December 2022 16:23
To: Catriona McPhee <catriona@stewartifa.co.uk>
Subject: RE: Fwd:

Classification: Limited

Hi Catriona,

I've asked the team and I'll be back in touch with you when I receive the process requirements

Speak soon,

Craig Buchanan | Account Manager – Individual Distribution

LP & I - Distribution | Scottish Widows Ltd Lloyds Banking Group
Tel: 0131 300 8013 | E-Mail: craig.buchanan@scottishwidows.co.uk

Business Development Manager – Chris Murphy T: 07341076028 E: chris.murphy@scottishwidows.co.uk

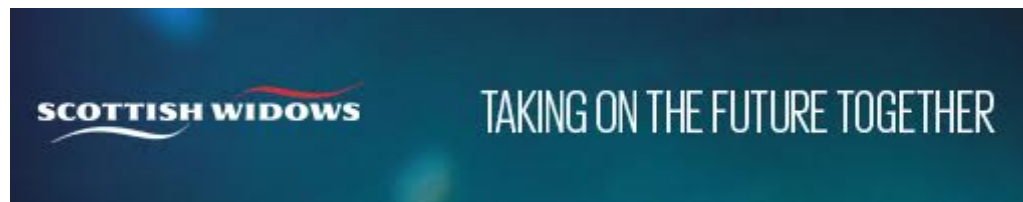
Relationship Support Consultant – David Lowery David.Lowery@scottishwidows.co.uk | P: 0345 610 9572
Pin: 148 1161

Retirement Account 0800 096 4364

Protection 0345 030 6240

Workplace 0345 850 1060

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From: Catriona McPhee <catriona@stewartifa.co.uk>
Sent: 14 December 2022 16:10
To: Buchanan, Craig (SW Head Of Individua, Insurance & Wealth) <Craig.Buchanan@scottishwidows.co.uk>
Subject: FW: Fwd:

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Hi Craig,

Can you please let us know what is needed for the below request from Nicola.

Thanks in advance

Catriona

From: Nicola Steele <nicolarsteele@googlemail.com>
Sent: 14 December 2022 15:34
To: Catriona McPhee <catriona@stewartifa.co.uk>
Subject: Fwd:

Hi Catriona,

Is it possible for you to contact Scottish Widows and advise them that I wish to transfer my policy to a SSAS. If possible could they be able to provide me with the transfer out form?

Many thanks,

Nicola