



Lisa Welton <lisa@retirement.capital>

Re: New Money helper: Transfer out request -Nicola Steele - 41418735 - Nicola Steele Pension Scheme

1 message

Lisa Welton <lisa@retirement.capital>

21 September 2023 at 10:48

To: "nicolarsteele@gmail.com" <nicolarsteele@gmail.com>

Hi Nicola,

Just following on to you from my below email to them. This should be the final thing they request. Before making the transfer of your funds. I have put a follow up to contact you on the 4th after your money helper if I haven't heard from you.. so we can have the money helper confirmation sent on to Scottish widows for them to continue and proceed with the transfer of your funds... It may not feel like it but it is good news!

Kind regards
Lisa

On Thu, 21 Sept 2023 at 10:43, <info@rcadministration.com> wrote:

Dear Transfers Team,

Client name: **Nicola Steele**
Pension Company Policy/Plan Number: **41418735**
NINO: **NZ644569A**

Nicola Steele has advised she received a letter from you yesterday which is requesting a new money helper appointment from you. I have attached from Nicola her new money helper appointment is confirmed on 03 October 2023 in the early afternoon.

Please confirm receipt of this confirmation. She will be in touch with you after this appointment has been completed.

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 06/06/2023 09:03 BST info@rcadministration.com wrote:

Good morning Transfers Team

Client name: **Nicola Steele**
Pension Company Policy/Plan Number: **41418735**
NINO: **NZ644569A**

Please find attached the signed Declaration form for Nicola Steele to transfer her pension out along with a cover letter. These documents have also been sent to you by post.

I would be most grateful if you may process Nicola Steele 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

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On 17/05/2023 09:58 CEST info@rcadministration.com wrote:

Good morning Transfers Team,

Client name: **Nicola Steele**
Pension Company Policy/Plan Number: **41418735**
NINO: **NZ644569A**

Please find attached the completed application from Nicola Steele to transfer her pension out, together with the following documents these have also been posted:

1. Pension Transfer Out Form
2. Trust Deed
3. Scheme Rules
4. Authority Letter
5. Company Employment Letter
6. Company Contributions Schedule letter
7. HMRC Tax Registration Letter
8. HMRC Screenshot
9. SSAS Bank account details
10. SSAS Bank Statement
11. Payslip (Annual)
12. Personal bank statements with income
13. Members Guide
14. Cover Letter

I would be most grateful if you may process Nicola Steele 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

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9/21/23, 10:51 AM

Retirement.Capital Mail - Re: New Money helper: Transfer out request -Nicola Steele - 41418735 - Nicola Steele Pension S...

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