

Subject: Transfer from Scottish Widows Nicola Steel Pension Scheme (CT-1257198)
From: \$RetirementAccountClaims <RetirementAccountClaims@scottishwidows.co.uk>
Date: Wed, 27 Sep 2023 14:16:53 +0000
To: "info@rcadministration.com" <info@rcadministration.com>

[Reply Securely](#)

Classification: Confidential

Dear Lisa,

Many thanks for sending the attached we will note the date of the appointment and pend the case until after this point, awaiting further confirmation from the client themselves once they have had the appointment.

Regards,
David

David Kerr

Retirement Account Claims
Insurance, Pensions and Investments Chief Operating Office (IP&ICOO)

Address: 69 Morrison Street, EDINBURGH, EH3 1HL

T: 03457 166 733 E: retirementaccountclaims@scottishwidows.co.uk

From: \$RetirementAccountClaims <RetirementAccountClaims@scottishwidows.co.uk> Sent: Wednesday, September 27, 2023 1:52 PM

To: Kerr, David (Indiv Pensions (L), Insurance & Wealth) <David.Kerr1@lloydsbanking.com>

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

Can you look into this please

From: info@rcadministration.com <<mailto:info@rcadministration.com>> <info@rcadministration.com>
<<mailto:info@rcadministration.com>> > Sent: Thursday, September 21, 2023 9:43 AM
To: \$RetirementAccountClaims <RetirementAccountClaims@scottishwidows.co.uk>
<<mailto:RetirementAccountClaims@scottishwidows.co.uk>> >
Cc: nicolarsteele@gmail.com <<mailto:nicolarsteele@gmail.com>> Subject: New Money helper: Transfer out request -Nicola Steele - 41418735 - Nicola Steele Pension Scheme

*** This email is from an external source - be careful of attachments and links. Please report suspicious emails ***

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 <<mailto: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

Phone: 0330 311 0839

1A Park Lane Poynton Cheshire SK12 1RD

Company Number: 12409200

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

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