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Lisa Welton
SSAS Pension Scheme Administrator
1A Park Lane
Poynton
Cheshire
SK12 1RD



Scottish Widows Limited
PO Box 24171
69 Morrison Street
Edinburgh
EH3 1HL

Telephone: 0800 028 7350
Extension number: 1588187

04 March 2024

Our reference: 18266669
Your reference: Nicola Steele

Dear Ms Welton

I have wrote to you on 3 January 2024 and 31 January 2024 in relation to the transfer for Mrs Nicola Steele. I cannot evidence we have received a response from your about this. We completed a transfer for Mrs Nicola Steele to the Nicola Steele Pension Scheme. After further investigation I have established we should have transferred the benefits to you sooner.

Can you please confirm if Mrs Steele has been financially disadvantaged by Scottish Widows sending the transfer on 20 November 2023 rather than on 18 October 2023? If she has been disadvantaged, can you confirm what is required to put her int the correct position and if you will accept a payment from us?

If you've got any questions, you can call me on 0800 028 7350, our office is open 9am to 5pm Monday to Friday and someone else can help you if I'm not available.

Yours sincerely

Lauren McLeod

Lauren McLeod
Complaint Manager, Customer Services

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If you need support due to a disability, please get in touch.