



Emily McAlister <emily@retirement.capital>

RE: Rutherford Pension Plan

12 messages

Alistair Douglas <Alistair.Douglas@brewin.co.uk>

1 June 2021 at 11:22

To: Rosi Cullen <rosi.cullen@btconnect.com>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>

Cc: Emily McAlister <emilym@pensionpractitioner.com>, Gavin <gavinm@pensionpractitioner.com>

Dear Rosi

I hope you had an enjoyable bank holiday weekend.

I am just in touch as I am pleased to confirm that we have now set up portfolio's in the girls names, these are detailed below

Claire – RUTHE0163

Jane – RUTHE0165

We are now in a position to transfer the investments from the Rutherford Pension Plan across to the girls once we receive the instruction.

Kind regards

Alistair

From: Rosi Cullen <rosi.cullen@btconnect.com>**Sent:** 25 May 2021 16:34**To:** 'Steven Mason (GNBFS)' <steven@gnbfs.co.uk>; Alistair Douglas <Alistair.Douglas@brewin.co.uk>**Cc:** 'Emily McAlister' <emilym@pensionpractitioner.com>; 'Gavin' <gavinm@pensionpractitioner.com>**Subject:** Rutherford Pension Plan

Hi Alistair,

It looks like you have now got all the information you need from the girls. When you have set up the accounts for them, can you please provide me with the account details, copying Emily McAlister at Pension Practitioners. Emily will then be able to initiate the transfer paperwork.

If there are any issues, please let me know.

Many thanks for all your help.

Kind regards

Rosi

Rosi Cullen <rosi.cullen@btconnect.com>

1 June 2021 at 15:57

To: Alistair Douglas <Alistair.Douglas@brewin.co.uk>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>

Cc: Emily McAlister <emilym@pensionpractitioner.com>, Gavin <gavinm@pensionpractitioner.com>

Thanks Alistair,

Lovely weekend thanks, hope you did too.

Thanks for letting me know that you have set up the girls' portfolios. Emily or Gavin should confirm that you can transfer the investments.

Kind regards

Rosi

[Quoted text hidden]

Rosi Cullen <rosi.cullen@btconnect.com>

1 June 2021 at 16:09

To: emily@retirement.capital

Cc: gavin@retirement.capital

From: Rosi Cullen <rosi.cullen@btconnect.com>

Sent: 01 June 2021 14:57

To: 'Alistair Douglas' <Alistair.Douglas@brewin.co.uk>; 'Steven Mason (GNBFS)' <steven@gnbfs.co.uk>

Cc: 'Emily McAlister' <emilym@pensionpractitioner.com>; 'Gavin' <gavinm@pensionpractitioner.com>

Subject: RE: Rutherford Pension Plan

Thanks Alistair,

Lovely weekend thanks, hope you did too.

Thanks for letting me know that you have set up the girls' portfolios. Emily or Gavin should confirm that you can transfer the investments.

Kind regards

Rosi

From: Alistair Douglas <Alistair.Douglas@brewin.co.uk>

Sent: 01 June 2021 10:22

To: Rosi Cullen <rosi.cullen@btconnect.com>; 'Steven Mason (GNBFS)' <steven@gnbfs.co.uk>

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Rosi Cullen <rosi.cullen@btconnect.com>

1 June 2021 at 16:11

To: emily@retirement.capital

Hi Emily,

I tried copying Gavin on this email, but it didn't get delivered to him. Have I got the wrong email address?

Many thanks

Rosi

From: Rosi Cullen <rosi.cullen@btconnect.com>

Sent: 01 June 2021 15:09

To: 'emily@retirement.capital' <emily@retirement.capital>

Cc: 'gavin@retirement.capital' <gavin@retirement.capital>

Subject: FW: Rutherford Pension Plan

From: Rosi Cullen <rosi.cullen@btconnect.com>

Sent: 01 June 2021 14:57

To: 'Alistair Douglas' <Alistair.Douglas@brewin.co.uk>; 'Steven Mason (GNBFS)' <steven@gnbfs.co.uk>

Cc: 'Emily McAlister' <emilym@pensionpractitioner.com>; 'Gavin' <gavinm@pensionpractitioner.com>

Subject: RE: Rutherford Pension Plan

Thanks Alistair,

Lovely weekend thanks, hope you did too.

Thanks for letting me know that you have set up the girls' portfolios. Emily or Gavin should confirm that you can transfer the investments.

Kind regards

Rosi

From: Alistair Douglas <Alistair.Douglas@brewin.co.uk>

Sent: 01 June 2021 10:22

To: Rosi Cullen <rosi.cullen@btconnect.com>; 'Steven Mason (GNBFS)' <steven@gnbfs.co.uk>

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[Quoted text hidden]

Emily McAlister <emily@retirement.capital>

1 June 2021 at 16:19

To: Rosi Cullen <rosi.cullen@btconnect.com>

Hi Rosi,

Everything is ok. Gavin is off this week as a holiday but I am in contact with him so will get this sorted.

You should have received an out of office reply when you emailed him.

Thanks

Emily

[Quoted text hidden]

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Retirement
.Capital



Web: <https://retirement.capital>

Phone: 0330 311 0088

Email: emily@retirement.capital

Data Processing Centre
Retirement.Capital
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Rosi Cullen <rosi.cullen@btconnect.com>

1 June 2021 at 16:22

To: Emily McAlister <emily@retirement.capital>

Hi Emily,

No, I got an undeliverable message, so I thought I should contact you. Maybe just a glitch with his new email address.

Rosi

[Quoted text hidden]

Emily McAlister <emily@retirement.capital>
To: gavin mccloskey <gavinm@retirement.capital>

8 June 2021 at 16:37

Hi Gav,

Can you let me know what I need to do on this now please?

Thanks
Emily

----- Forwarded message -----

From: **Alistair Douglas** <Alistair.Douglas@brewin.co.uk>

Date: Tue, 1 Jun 2021 at 11:22

Subject: RE: Rutherford Pension Plan

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[Quoted text hidden]

[Quoted text hidden]

Gavin <gavinm@pensionpractitioner.com>

15 June 2021 at 23:46

To: Alistair Douglas <Alistair.Douglas@brewin.co.uk>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>, gavin mccloskey <gavinm@retirement.capital>

Hi Alistair,

Many thanks for your email and confirmation of the set up of the accounts. Can you kindly proceed with re-registration "in-specie transfer" of holdings from the Rutherford Pension Plan into the accounts on pari pasu and provide a valuation of the holdings once the registrations have been completed in both accounts at completion. I would suggest that the cash account with Brewin should be the last transfer to be completed as there may well be dividends income receivable.

Would you kindly note my new email address for our online platform which is the best and quickest contact method going forward.

Many thanks
Gavin

Pension Practitioner

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Pension Practitioner is a tradestyle of The Practitioners Partnership LP

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Alistair Douglas <Alistair.Douglas@brewin.co.uk>

16 June 2021 at 08:59

To: Gavin <gavinm@pensionpractitioner.com>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>, gavin mccloskey <gavinm@retirement.capital>, Charlie Slater <Charlie.Slater@brewin.co.uk>

Morning Gavin

Thank you for confirming. We will go ahead and split the investments as best we can in half. Any difference can be made up in the allocation of cash.

Kind regards

Alistair

[Quoted text hidden]

gavin mccloskey <gavinm@retirement.capital>

16 June 2021 at 09:29

To: Alistair Douglas <Alistair.Douglas@brewin.co.uk>, Gavin <gavinm@pensionpractitioner.com>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>, Charlie Slater <Charlie.Slater@brewin.co.uk>

Great many thanks for your swift response.

From: Alistair Douglas <Alistair.Douglas@brewin.co.uk>

Sent: Wednesday, June 16, 2021 8:59:40 AM

To: Gavin <gavinm@pensionpractitioner.com>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>; Steven Mason (GNBFS) <steven@gnbfs.co.uk>; Emily McAlister <emilym@pensionpractitioner.com>; gavin mccloskey <gavinm@retirement.capital>; Charlie Slater <Charlie.Slater@brewin.co.uk>

Subject: RE: Rutherford Pension Plan

Morning Gavin

[Quoted text hidden]

Alistair Douglas <Alistair.Douglas@brewin.co.uk>

29 June 2021 at 15:42

To: Gavin <gavinm@pensionpractitioner.com>, gavin mccloskey <gavinm@retirement.capital>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>, "emily@retirement.capital" <emily@retirement.capital>, Charlie Slater <Charlie.Slater@brewin.co.uk>

Dear Gavin

I just wanted to give a progress report. With exception of 2 investments (overseas) the portfolio has been split in two and transferred to Claire and Jane. The remaining two should move in the next day or so.

Either myself or Charlie, my colleague, will be in touch as soon as the final transfers have been made. I am on annual leave on Wednesday for 3 days.

Kind regards

Alistair

From: Gavin <gavinm@pensionpractitioner.com>

Sent: 15 June 2021 22:46

To: Alistair Douglas <Alistair.Douglas@brewin.co.uk>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>; Steven Mason (GNBFS) <steven@gnbfs.co.uk>; Emily McAlister <emilym@pensionpractitioner.com>; gavin mccloskey <gavinm@retirement.capital>

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[Quoted text hidden]

Alistair Douglas <Alistair.Douglas@brewin.co.uk>

9 July 2021 at 17:06

To: Gavin <gavinm@pensionpractitioner.com>, gavin mccloskey <gavinm@retirement.capital>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>, "Steven Mason (GNBFS)" <steven@gnbfs.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>, "emily@retirement.capital" <emily@retirement.capital>, Charlie Slater <Charlie.Slater@brewin.co.uk>

Good afternoon all

I am pleased to confirm that everything from the Pension Plan has now been split between Jane and Claire.

Kind regards

Alistair

From: Alistair Douglas

Sent: 29 June 2021 14:42

To: Gavin <gavinm@pensionpractitioner.com>; gavin mccloskey <gavinm@retirement.capital>

Cc: Rosi Cullen <rosi.cullen@btconnect.com>; Steven Mason (GNBFS) <steven@gnbfs.co.uk>; Emily McAlister <emilym@pensionpractitioner.com>; emily@retirement.capital; Charlie Slater <Charlie.Slater@brewin.co.uk>

Subject: RE: Rutherford Pension Plan

Dear Gavin

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