



Emily McAlister &lt;emily@retirement.capital&gt;

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**RE: Rutherford Pension Plan**

14 messages

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

1 June 2021 at 11:22

To: Rosi Cullen &lt;rosi.cullen@btconnect.com&gt;, "Steven Mason (GNBFS)" &lt;steven@gnbfs.co.uk&gt;

Cc: Emily McAlister &lt;emilym@pensionpractitioner.com&gt;, Gavin &lt;gavinm@pensionpractitioner.com&gt;

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

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**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.

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Kind regards

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**Sent:** 01 June 2021 10:22

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

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

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To: [emily@retirement.capital](mailto:emily@retirement.capital)  
Cc: [gavin@retirement.capital](mailto:gavin@retirement.capital)

1 June 2021 at 16:09

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To: emily@retirement.capital

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To: Rosi Cullen <[rosi.cullen@btconnect.com](mailto:rosi.cullen@btconnect.com)>

1 June 2021 at 16:19

Hi Rosi,

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

Thanks  
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Phone: 0330 311 0088

Email: [emily@retirement.capital](mailto:emily@retirement.capital)

Data Processing Centre  
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Venture Wales Building  
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Wales  
CF48 4DR

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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

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**Emily McAlister** <[emily@retirement.capital](mailto:emily@retirement.capital)>  
To: gavin mccloskey <[gavinm@retirement.capital](mailto: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 -----

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15 June 2021 at 23:46

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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

T: 0800 634 4862

F: 020 8906 6611

Administration Centre: Venture Wales, Pentrebach. Merthyr Tydfil. CF48 4DR

Pension Practitioner is a tradestyle of The Practitioners Partnership LP

Registered Number: 00159

Registered Office: 1st Floor, World Trade Centre, Baytree Road, Gibraltar GX11 1AA

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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

---

**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

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**From:** Gavin <[gavinm@pensionpractitioner.com](mailto:gavinm@pensionpractitioner.com)>

**Sent:** 15 June 2021 22:46

**To:** Alistair Douglas <[Alistair.Douglas@brewin.co.uk](mailto:Alistair.Douglas@brewin.co.uk)>

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

**Subject:** Re: Rutherford Pension Plan

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

T: 0800 634 4862

F: 020 8906 6611

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**gavin mccloskey** <[gavinm@retirement.capital](mailto:gavinm@retirement.capital)>

16 June 2021 at 09:29

To: Alistair Douglas <[Alistair.Douglas@brewin.co.uk](mailto:Alistair.Douglas@brewin.co.uk)>, Gavin <[gavinm@pensionpractitioner.com](mailto:gavinm@pensionpractitioner.com)>

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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>

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**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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Rosi

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**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>

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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>

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**Sent:** 15 June 2021 22:46

**To:** Alistair Douglas <[Alistair.Douglas@brewin.co.uk](mailto:Alistair.Douglas@brewin.co.uk)>

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

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If there are any issues, please let me know.

Many thanks for all your help.

Kind regards

Rosi

---

**Emily McAlister** <[emily@retirement.capital](mailto:emily@retirement.capital)>

13 July 2021 at 17:20

To: Alistair Douglas <[Alistair.Douglas@brewin.co.uk](mailto:Alistair.Douglas@brewin.co.uk)>

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

Thank you Alistair.

Kind regards  
Emily

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Retirement  
.Capital



Web. <https://retirement.capital>  
Phone: 0330 311 0088  
Email: [emily@retirement.capital](mailto:emily@retirement.capital)

Data Processing Centre  
Retirement.Capital  
Venture Wales Building  
Merthyr Tydfyl Industrial Business Park  
Merthyr Tydfyl  
Wales  
CF48 4DR

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**Rosi Cullen** <[rosi.cullen@btconnect.com](mailto:rosi.cullen@btconnect.com)>  
To: Emily McAlister <[emily@retirement.capital](mailto:emily@retirement.capital)>

20 December 2022 at 13:22

Hi Emily,

Please see emails below from Alistair Douglas at Brewin Dolphin regards transfer of funds.

Kind regards

Rosi

**From:** Alistair Douglas <Alistair.Douglas@brewin.co.uk>  
**Sent:** 09 July 2021 16:07  
**To:** Gavin <gavinm@pensionpractitioner.com>; gavin mccloskey <gavinm@retirement.capital>  
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**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

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

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**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>  
**Subject:** Re: Rutherford Pension Plan

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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On Tue, 1 Jun 2021 at 11:22, Alistair Douglas <[Alistair.Douglas@brewin.co.uk](mailto:Alistair.Douglas@brewin.co.uk)> wrote:

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

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