



Emily McAlister <emily@retirement.capital>

Fwd: - Mrs Susan Savage - Savent - losing scheme

1 message

Sue Savage <savage.sue@icloud.com>
To: Emily McAlister <emily@retirement.capital>

13 December 2021 at 14:40

FYI

Begin forwarded message:

From: Victoria Lockhart <customerservices@groupfirst.co.uk>
Subject: Re: Re:- Mrs Susan Savage - Savent - losing scheme
Date: 27 May 2021 at 08:51:41 BST
To: clientrelationshipsteam@rowanmoor.co.uk, Overseas Property Team <overseas@embark.co.uk>, savage.sue@icloud.com, Stacy Lunnnon <stacyl@retirement.capital>, SSAS.KVR@rowanmoor.co.uk, Ruth Almond <ra@groupfirst.co.uk>

Good morning all,

Re - Mrs Susan Savage - Client Ref - 11947 - Wakefield & Client Ref - 9900 - Northampton

Thank you all for your recent correspondence.

There has been no confirmation from any party to advise the Legal Entity has been changed to Retirement Capital.

I have checked on Land Registry for each property and these still remain in the name of Rowanmoor and Mrs Savage as shown below -

I have attached a transfer guide to help you further if needed.

The contact details for our solicitors are also within the transfer guide and they will help you with any queries you may have with regards to changing the Legal Entity.

Once confirmation is received we will be happy to update the bank details and records.

If you need any more assistance, please do not hesitate to contact myself or any member of the Customer Services Team here at Group First Head Office.

Kind Regards,

Victoria Lockhart
Customer Liaison Officer

Group First Global Ltd

Head Office & Accounts
Group First House
Mead Way
Padiham
Lancashire
United Kingdom
BB12 7NG

Groupfirst.co.uk

Direct: [+44 \(0\)1282 681 612](tel:+44201282681612)
Office: [+44 \(0\)1282 330 330](tel:+44201282330330)
Email: customerservices@groupfirst.co.uk

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On Wed, 26 May 2021 at 15:19, Ruth Almond <ruth.almond@groupfirst.co.uk> wrote:

Hello both

Email from Rowanmoor re change of legal entity. I am not aware we have been notified of the change, perhaps we can check with Ashton if this is in the pipeline ? Please can you update Dan.

Thanks
Ruth

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

From: Client Relationship Team <clientrelationshipsteam@rowanmoor.co.uk>
Date: Wed, 26 May 2021 at 14:58
Subject: RE: Re:- Mrs Susan Savage - Savent - losing scheme
To: sally.farrimond@groupfirst.co.uk <sally.farrimond@groupfirst.co.uk>
Cc: Overseas Property Team <overseas@embark.co.uk>

Dear Sally,

SavEnt Ltd Executive Pension Scheme

Further to the emails below, I confirm that the Scheme is in the process of being taken over by Retirement Capital and they should be re-registering the assets from Rowanmoor to them.

Please can you confirm whether the registration of the Storefirst asset has now been updated to reflect the change? If this has happened, then the bank details can be updated accordingly. If the asset has not yet been re-registered and is still in Rowanmoor's name, the bank details shouldn't be changed until the asset has been formally re-registered to Retirement Capital.

Thank you for your assistance.

Kind regards

Dan Bucknall

From: Overseas Property Team
Sent: 13 April 2021 13:40
To: SSAS KVR Team - Rowanmoor <SSAS.KVR@rowanmoor.co.uk>
Cc: sally.farrimond@groupfirst.co.uk
Subject: FW: Re:- Mrs Susan Savage - Savent - losing scheme

Good afternoon,

Sally Farrimond of Storefirst (copied in) has been instructed by the member that all future income from the Storefirst asset should be sent to the account with the new pension trustees, and she is unsure whether this is correct.

Please would you confirm whether this is appropriate given the losing scheme status? As the scheme itself does not change any liability for rates will travel with the scheme as far as I am aware. Can you confirm if this is also your understanding?

Many thanks

Sue

From: Sally Farrimond <sally.farrimond@groupfirst.co.uk>
Sent: 07 April 2021 16:52
To: Sue Morson <sue.morson@embarkproperty.co.uk>
Subject: Re:- Mrs Susan Savage

Hi Sue

Hope you are well today.

I have received a letter of authority from Mrs Susan Savage giving authority for ourselves to correspond with Stacy Lunnon at Retirement Capital.

Mrs Savage has given bank details (Account No and Sort Code) for any rental to go to Savent Ltd Executive Pension Scheme c/o Retirement Capital.

Ms Lunnon has emailed to say that the investment is not a transfer, it is just a change in administration of the SSAS.

Please can you advise. Mrs Savage's address is:-

26 Clarence Road
Attenborough
Nottingham
NG9 5HY

Many Thanks

Kind Regards,

Sally Farrimond

Customer Liaison Officer

Group First Global Ltd

Head Office & Accounts
Group First House
Mead Way
Padiham
Lancashire

United Kingdom
BB12 7NG

Groupfirst.co.uk

Direct: [+44 \(0\)1282 681 612](tel:+441282681612)

Office: [+44 \(0\)1282 330 330](tel:+441282330330)

Email: sally.farrimond@groupfirst.co.uk



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Client Relationship Team

Rowanmoor

Best SSAS Provider 2008 - 2018
Investment Life & Pensions Moneyfacts Awards

AKG Financial Strength Rating of B (strong)

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Ruth Almond
Group First Global Ltd

Head Office & Accounts
Group First House
Mead Way
Padiham
Lancashire
United Kingdom
BB12 7NG

Groupfirst.co.uk

Mobile: [+44 \(0\)7973 312 077](tel:+44207973312077)
Office: [+44 \(0\)1282 330 330](tel:+44201282330330)
Email: ruth.almond@groupfirst.co.uk

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3 attachments

NOTE: HIGHLIGHTS IN RED
1 (14.08.2019) The leasehold land demised by the lease referred to below which lies within the area shown edged with red on the plan of the above title filed at the Registry and being first floor store and ROSS Boundary Close, between 2013 and 2014.
2 (14.08.2019) The title includes any legal easements referred to in clause 2(1) of the registered lease and is subject to any rights that are granted or reserved by the lease and affect the registered land.
3 (14.08.2019) The land has the benefit of the rights reserved by but is subject to the rights reserved by the Transfer dated 15 December 2002 referred to at the Charge Register.
4 (14.08.2019) Short particulars of the lease(s) (or under-lease(s)) under which the land is held:
Date : 14 June 2019
Term : Full term including 1 June 2019 for 999 years
Parties : (1) Group First Limited
(2) Rossmore Trustees Limited and Ross Garage
5 (14.08.2019) The lease prohibits or restricts alienation.
6 (14.08.2019) The landlord's title is registered.

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162K

NOTE: HIGHLIGHTS IN RED
1 (14.08.2019) The leasehold land demised by the lease referred to below which lies within the area shown edged with red on the plan of the above title filed at the Registry and being Garage and Shop Unit 1, between 2013 and 2014.
NOTE: The design set in on the second floor.
2 (14.08.2019) Short particulars of the lease(s) (or under-lease(s)) under which the land is held:
Date : 14 June 2019
Term : Full term from and including 1 January 2013
Parties : (1) Group First Limited
(2) Rossmore Trustees Limited and Ross Garage
3 (14.08.2019) The lease prohibits or restricts alienation.
4 (14.08.2019) The land has the benefit of any legal easements granted by clause 2(1) of the registered lease dated 14 June 2019 referred to above but is subject to any rights that are reserved by the said lease and affect the registered land.
5 (14.08.2019) The landlord's title is registered.

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 Group First Property Transfer & Guidance Note.docx
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