

Task Details

ID 347300
Subject ADMIN - Task Reminder (Schirge CC 100% withdrawal)
Assigned By Mylie, Rochelle
Assigned To Mylie, Rochelle
Entity Schirge, Gudrun (client)
Type Client Correspondence
Priority Normal
Status Pending
Description From: Heila Reinecke <Heila@ultimafp.co.za>
Sent: Wednesday, 28 September 2022 08:11
To: gudrun <gudrun@aims.ac.za>
Cc: Gerrit Viljoen <Gerrit@ultimafp.co.za>; Roch lle Mylie <rochelle@ultimafp.co.za>
Subject: Schirge Farm cc - OMW TP - 100% withdrawal - Ref: [OMWDS5144265]

M res  Gudrun

Hiermee die OMW Tailored Portfolio staat waar die 100% terugkoping van Schirge Farm afgehandel is.
(gebruik jou identiteitsnommer om dokument oop te maak)

Die fonde behoort binne dag of twee in Schirge Farm se bankrekening te reflekteer.
Indien nie, is jy welkom om Rochelle Mylie te skakel om op te volg.

Mooi gaan met jou Gudrun en ons sien mekaar wanneer jy in Pretoria kom kuier.#

Kind regards / Vriendelike groete

Heila Rein
Admin Assistant

Due Date 07 Oct 2022
Reminder Days 0
Attachments
Outcomes

- Complete Normally

Likelihood 100.00 %
Fund Under Advice 0.00
Forecast FUA 0.00
Revenue 0.00
Forecast Revenue 0.00
Ongoing Revenue 0.00
Forecast Ongoing Revenue 0.00
Force Time-Taken No
Force Comment when Complete Yes
Charge Time Taken 00:00 minutes
Non-Charge Time Taken 00:00 minutes
Total Time Taken 00:00 minutes
Email Notifications

- Notify assignee when created
- Notify assignee when due and not complete
- Notify client' service manager when due and not complete

Reports
Created Time 28 Sep 2022 , 4:13 PM
Modified Time 03 Oct 2022 , 10:05 AM
Modified By Mylie, Rochelle

Comments

Time	Time Taken	User	Type	Content
03 Oct 2022 10:05 AM	00:00	Mylie, Rochelle	User	<p>From: Roch�lle Mylie Sent: Monday, 03 October 2022 10:04 To: Gudrun Schirge <gudrun@aims.ac.za> Cc: Gerrit Viljoen <Gerrit@ultimafp.co.za> Subject: RE: Schirge Farm cc - OMW TP - 100% withdrawal - Ref: [OMWDS5144265]</p> <p>Goiemore Gudrun,</p> <p>Baie dankie vir jou e-pos en bevestiging.</p> <p>Ek is inderdaad jou nuwe kontak persoon, aangename kennis.</p>

Task Details

Moet nie bekommer nie, ek weet almal se gemoed sak wanneer hulle 'n e-pos sien oor FICA vereistes!

Ons gaan almal vir Heila baie mis, maar gun haar hierdie nuwe seisoen absoluut.

Mooi dag.

Kind regards / Vriendelike groete

Roch lle Mylie CFP 
Administrator

t: +27 12 348 1386

Authorised Financial Services Provider FSP no 26/10/6828
Address 73 Kariba Street, Lynnwood Glen www.ultimafp.co.za
DISCLAIMER: www.ultimafp.co.za/Email_Disclaimer.pdf

From: Gudrun Schirge <gudrun@aims.ac.za>
Sent: Saturday, 01 October 2022 18:44
To: Roch lle Mylie <rochelle@ultimafp.co.za>
Cc: Gerrit Viljoen <Gerrit@ultimafp.co.za>
Subject: Re: Schirge Farm cc - OMW TP - 100% withdrawal - Ref: [OMWDS5144265]

Beste Roch lle

Die fondue reflekteer! Dankie vir jou navraag.

Ek neem aan jy is my 'nuwe Heila'? Ek het swaar afskeid geneem van Heila maar ek gun vir haar dat sy lekker laat kan l  soos ek deesdae ook. En die lewe is mos vol van verandering en vernuwing. As jy my nuwe Ultimakontak is dan is ek baie bly om kennis met jou te maak via epos. My eerste gedrag teenoor jou was nie baie goed nie aangesien ek maande gevat het om die FICA dokumente in te stuur. So ek kan van nou af net verbeter en ek sal hard probeer!

Baie groete
Gudrun

30 Sep 2022 11:02 AM 00:00

Mylie, Rochelle

User From: Roch lle Mylie
Sent: Friday, 30 September 2022 10:57
To: gudrun <gudrun@aims.ac.za>
Cc: Gerrit Viljoen <Gerrit@ultimafp.co.za>
Subject: FW: Schirge Farm cc - OMW TP - 100% withdrawal - Ref: [OMWDS5144265]

Beste Gudrun,

Hoop dit gaan goed met jou.

Ek wou net seker maak die fondse reflekteer? Is alles in orde daar?

Ons hoor graag van jou.

Mooi dag!

Kind regards / Vriendelike groete

Roch lle Mylie

28 Sep 2022 4:13 PM 00:00

Mylie, Rochelle

User Call client to confirm if she received the funds