

Our ref: PW/PMK

23 October 2013

Pensions Practitioner.com
Daws House
33-35 Daws Lane
LONDON
NW7 4SD



Dear Sirs

MR CHARLES STEVENSON CLOACA MAXIMA RETIREMENT BENEFITS SCHEME

Please find enclosed a letter from Mr Stevenson, authorising us to obtain information about his benefits in the scheme.

I would be grateful if you would confirm the following:-

- Type of scheme (we understand that this is a small self-administered scheme)
- Date of joining
- The value of the member's share as at 6th April 2006
- The value of the member's tax-free lump sum as at 6th April 2006. If it is possible, we would be grateful if you would advise what the member's maximum tax-free lump sum is now and whether he has an entitlement to more than 25% of his share
- The value of Mr Stevenson's share of the fund and details of how it is invested, if available. If the investments are not notionally earmarked for Mr Stevenson, it would be helpful if you could let us have some idea of how the investments in the scheme are made up
- Details of benefits payable on the death of the member and whether Mr Stevenson has nominated a recipient for the death benefit
- Normal retirement age
- Full contribution history for Mr Stevenson's share and details of the pension input period, if applicable, to Mr Stevenson's share
- Full name of the scheme and the employer

If you are able to provide any other information about this scheme which is relevant for Mr Stevenson, please contact me.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Philip Wise', is written over a series of horizontal lines.

Philip Wise
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Managing Director
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Dear Sirs

CLOACA MAXIMA RETIREMENT BENEFITS SCHEME

I am investigating my pension entitlement in this scheme, and have authorised Spofforths Financial Planning Limited of 18 Old Mill Square, Storrington, West Sussex, RH20 4NQ to obtain information about the scheme and any others I hold with you on an ongoing basis.

Please provide them with any information that they request in connection with this policy.

Yours faithfully



Mr C Stevenson

Date:

17/10/13