

IFS WEALTH MANAGERS

Partner Practice of St. James's Place Wealth Management

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ST. JAMES'S PLACE
WEALTH MANAGEMENT

Cranfords
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

07.02.2019

Dear Madam, Sir

Scheme: Doncaster Electrical Services Ltd Retirement Benefit Scheme

Member/Policyholder: William Michael Briggs

NI: YE866366A

D.O.B: 31/12/1946

Please find enclosed a letter of authority duly signed by our mutual client William Briggs to allow release of information for the policy named above.

I would be grateful if you could confirm the following details:

1. The current and transfer value of the policy.
2. A full contribution history.
3. If the plan was written under pre 6th April 2006 occupational pension scheme rules, please confirm the retirement tax-free cash entitlement under pre A-day rules in one of the two following ways:
 - a) TFC entitlement at today's date based on pre A Day rules (please specify if the tax free cash was lower than 25% of fund value at 'A' Day)
 - b) TFC entitlement at 5 April 2006 and the fund value of the arrangement on 5 April 2006 if the member left the scheme on or before that date. If confirming that the tax-free cash entitlement is 25% of fund value, please confirm whether or not a calculation was done to check whether the pre 'A' Day entitlement to tax-free cash could be higher than 25% of the fund value at 'A' Day.

If you will need to calculate the tax-free cash entitlement and need any further information, please let me know

4. Does the plan contain a transfer-in from an occupational scheme after 5th April 2006 and if so, was this recorded as a block transfer – i.e. more than one member of the occupational scheme transferring to your scheme on the same date?

MATTHEW LEADALL DipPFS
Director of IFS Wealth Managers

The Partner Practice represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website at www.sjp.co.uk/products.

The title 'Partner Practice' is the marketing term used to describe St. James's Place representatives.

IFS Wealth Managers is a trading name of Individual Financial Solutions Ltd which is registered in England & Wales No. 7260029.

Registered Office: Melbourne House 27 Thorne Road Doncaster DN1 2FZ.



5. If 'Yes', please confirm their tax-free cash entitlement at today's date or at 5th April 2006 if the member left the scheme on or before that date. If you were not advised of any protected TFC on transfer please confirm this
6. Please forward copies of any Warranty/Discharge forms that would need to be completed if the client decided to transfer their benefits
7. Please advise of all charges applied to the plan and any ongoing advice charges and any initial or ongoing commission paid.

Thank you for your assistance with this matter.

Yours faithfully



Matthew Gleadall

Director of IFS Wealth Managers

Partner Practice of St. James's Place Wealth Management



Signed Authority:

Policy Scheme: Doncaster Electrical Services Ltd Retirement Benefits Scheme

I hereby confirm my authority for you to release the above information and any further information requests to IFS Wealth Managers (part of St. James's Place Wealth Management) at 39 Meadow Drive, Tickhill, Doncaster, DN11 9ET. Authority is given for the above numbered plan and any other plans held.

Signed:..........(Client)

Name: William Michael Briggs

D.O.B: 31.12.1946

Address: Stonecote Edlington Lane Old Edlington Doncaster DN12 1PT

NI: YE866366A

Date of Authority: 07.02.2019

This is a certified
copy of the original,
and is a true
likeness of the holder