



redefining / standards

PRIVATE AND CONFIDENTIAL

Mr A Heaton  
37 Kimberley Street  
Coppull  
Chorley  
PR7 5AG

**How to Contact Elevate**

☎ phone 0845 600 2399  
✉ email [elevate@axawealth.co.uk](mailto:elevate@axawealth.co.uk)  
✉ mail AXA Wealth – Elevate  
PO Box 6877  
Basingstoke  
RG24 4RT

**Transfer Confirmation**

02 June 2015

Account holder(s) Andrew Heaton  
Elevate account number EL1279239

Dear Mr Heaton

Thank you for your request to transfer your Personal Pension Account.

I can confirm that £40,026.15 has been sent to Guinness Mahon.

Yours sincerely

Mike Shrimpton  
Customer Services Director

PRIVATE AND CONFIDENTIAL  
Mr A Heaton  
37 Kimberley Street  
Coppull  
Chorley  
PR7 5AG

#### How to contact your adviser

Neil Taylor

phone 01244470107

email [neilt@moneytreewm.co.uk](mailto:neilt@moneytreewm.co.uk)

mail Unit 5

Venture Point  
Stanney Mill Road  
Chester  
CH2 4NE

29 June 2013

Account holder **Mr A Heaton**  
Elevate account number **EL1279239**  
Product Wrapper(s): **Elevate PIA - Scheme 1**

## Your Adviser Charges Confirmation

Dear **Mr Heaton**

Please find below confirmation of the charges you have agreed to pay your adviser following your instruction to us to facilitate adviser charges through your product wrapper(s).

For more information about all of the charges that may apply to your Elevate account, please refer to 'Your Guide to Charges' and to the 'Charges Information' document given to you by your adviser.

#### Adviser charges

You have agreed to pay your adviser the following adviser charges from your Elevate product wrapper(s).

#### Elevate PIA - Scheme 1

#### Initial Adviser Charge

The table below shows a summary of the expected payments in, the adviser charges facilitated through the product wrapper(s) which will be deducted before investment into the assets selected.

Contribution Type	Payment in	Initial Adviser charges
Transfer from Prudential Pensions Ltd	£35,717.65*	£1,428.71*

#### Ongoing Adviser Charge

You have agreed to pay your adviser an Ongoing Adviser Charge of 0.50% of the value of your Elevate PIA - Sch 1 per annum. This is calculated daily and deducted from your Elevate PIA - Sch 1 on the 28th of each month.

## Your adviser charges confirmation - continued

For example, if the value is £50,000 at the time of calculation, this would be £20.83 monthly and if the value is £100,000 at the time of calculation, this would be £41.67 monthly.

Our records show that we have not received a completed **Adviser charges agreement** from you. We are unable to pay any charges to your adviser until this is received. If you have returned this agreement in the last few days you do not need to take any further action. If you have not completed an **Adviser charges agreement**, please contact your adviser.

If these details are correct you do not need to do anything. If you have any questions or if any of these details are incorrect, please contact your adviser. You can find their details at the top of this letter.

Please also ensure you keep this letter for future reference.

Yours sincerely



Dan Eddie

Head of Customer Services