

## Tracey Best

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**From:** Tracey Best <tbest@tag.uk.com>  
**Sent:** 29 October 2015 15:02  
**To:** info@pensionpractitioner.com  
**Subject:** Attn David Nicklin - M & B Rowland  
**Attachments:** Signed LOA - M&B Rowland.pdf

Good afternoon

Further to the above client, please find attached a signed letter of authority in order for you to transfer the servicing of the SSAS to us and provide us with full details (for example a copy of the latest valuation and up to date balance of accounts if applicable). This is following on from a meeting David Thompson held with the clients recently.

The LOA has the clients residential address but their company name and address is :

Lancashire PVC-U Trade Frames

Lancashire House

Woodhill Road

Bury

BL8 1BD

Please let me know if you require any further information such as dates of birth. The original letter is to follow in this evenings post.

We look forward to hearing from you soon

Yours sincerely

Tracey Best  
Administrator  
TAG Wealth Management  
Riverdale, 89 Graham Road, Sheffield S10 3GP  
Tel: 0114 263 2425 Fax: 0114 2307022

(Please note my normal working pattern is Monday and Thursday only, should an urgent response be required outside of these times please call 0114 2630888)

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**Partners: D Thompson MIFS DipFA & A R M Young MIFS DipFA**



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BENTLEY MANOR  
HIGH STREET  
WALSHAM  
BURY  
BLB 3AG

Pension Practitioner  
Dawes House  
33-35 Daws Lane  
London  
NW7 4SD

## LETTER OF AUTHORITY

### TO WHOM IT MAY CONCERN

With immediate affect TAG Wealth Management are now appointed as our Independent Financial Advisers and have the appropriate authority to recover information relating to our financial affairs particularly that of insurance, pensions and investments.

We would request that you provide them with all relevant information and assistance relating to my/our contracts of pension, insurance, investment or mortgage that they may require.

Policy Type	Policy No	Life Insured / Assignee
SSAS		Mark Rowland

Could you also send copies of any future correspondence and any future renewal commission on the contracts we have with your company to the agency of:-

TAG Wealth Management, Riverdale, 89 Graham Road, Sheffield S10 3GP

Signed	Date
	20 <sup>th</sup> Oct 2015
Mark Rowland	
Signed	Date
	20 <sup>th</sup> Oct 2015
BEUNDA ROWLAND	

