

Pension Practitioner.com
Office 12
Venture Wales Building
Merthyr
Tydfil
CF48 4DR

18 April 2019

Client Name(s): Mr David John Wallington
Client Date(s) of Birth: 13.06.1965
Client Address: 11 Abbey Road, Simpson, Milton Keynes, MK6 3AE
Previous Address: 76 Kirkwood Grove, Medbourne, Milton Keynes, MK5 6FP
Our Reference: PDT322151
Scheme Number: 00803334RS

Dear Sirs,

We have been instructed by our above-named client to make a full Data Subject Access Request on their behalf under the General Data Protection Regulation.

Please accept this letter, along with the enclosed authority, as a request for all information held by your company in respect of the above-named individual, in relation to the transfer of their existing pension(s). *The information we require is:*

- A full transaction history from inception to present.
- A current fund valuation statement/schedule of assets currently held within the scheme along with their value.
- A copy of the Pension Application Form
- Confirmation of the name and contact details of any IFA/servicing agent
- A copy of the pension transfer documents
- A copy of the Investment Application Form/Contract.
- Your entire internal records from the time the pension transfer was effected by you on behalf of our client;
- Copy illustrations provided by you to our client;
- Copy due diligence undertaken by you into the underlying investment within the scheme recommended by you;
- A copy of any Terms & Conditions, suitability letters, fact finds or questionnaires held on our client's file.
- Full details of all costs and commissions paid to you or by you to any third party purportedly on behalf of our client.

Please ensure you provide this information within 30 days. Should you require anything further, please contact one of our team by return correspondence or by phone on the number below.

Yours faithfully,

C. Round

DRSP Limited

0800 849 5078

enquiries@drspclaims.co.uk