



PHOENIX LIFE

Phoenix Life Limited
301 St. Vincent Street
GLASGOW
G2 5NB

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08929501/000001/001/005

PRIVATE & CONFIDENTIAL
MR R BRAGMAN
FERNDAL
KINGSTON HILL
KINGSTON UPON THAMES
KT2 7JH

Executive Pensions Product Desk

Phone : 0345 600 0408

International: +44 (0) 1732 427115

Fax : 0141 221 8885

Account Number : 1361225

Date : 1 January 2021

Dear Sirs

Please find enclosed your Annual Plan Statement. We have improved the layout of this statement to give you information about your Phoenix Life Limited pension account in a clearer format. It includes transactions for the last year and current values of all plans within your account.

If any information on your statement is incorrect or you would like any further information about your Account you should contact your Independent Financial Adviser. You can also contact our Customer Services Desk by phone on 0345 600 0408, by fax on 0141 221 8885 or you can write to the Executive Pensions Department at the address above.

Please quote your relevant account number in any communication.

Yours sincerely

Milind Dhuru
Operations Director



Corporate Investment Account
Annual Plan Statement

Account Number : 1361225

Value of the THE R BRAGMAN LTD DIRECTORS PENSION SCHEME
Corporate Investment Account
at 28/12/2020

Pension Fund	Units Held	Unit Bid Price	Unit Value
SM HALIFAX PENSION	35,773.931	735.80	263,224.58
A Deposit fund invested with Halifax Building Society. The rate of interest is linked to the Halifax standard variable mortgage rate.			
Total Plan Value			£263,224.58

Remember the value of an investment can fall as well as rise.



**Corporate Investment Account
Annual Plan Statement**

**Details of the THE R BRAGMAN LTD DIRECTORS PENSION SCHEME
Corporate Investment Account**

The aim of this plan is to invest a lump sum on behalf of the pension scheme members and enjoy substantial tax benefits.

Commencement date : 29/12/1994

Contributions between 29/12/2019 and 28/12/2020 : £0.00

Phoenix Life Limited
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Yours sincerely



Milind Dhuru
Operations Director



Corporate Investment Account
Annual Plan Statement

Account Number : 1361225

Value of the THE R BRAGMAN LTD DIRECTORS PENSION SCHEME
Corporate Investment Account
at 28/12/2021

Pension Fund	Units Held	Unit Bid Price	Unit Value
SM HALIFAX PENSION	35,773.931	758.50	271,345.26
A Deposit fund invested with Halifax Building Society. The rate of interest is linked to the Halifax standard variable mortgage rate.			
Total Plan Value			£271,345.26

Remember the value of an investment can fall as well as rise.



**Corporate Investment Account
Annual Plan Statement**

**Details of the THE R BRAGMAN LTD DIRECTORS PENSION SCHEME
Corporate Investment Account**

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Commencement date : 29/12/1994

Contributions between 29/12/2020 and 28/12/2021 : £0.00

