

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

10 September 2015

Dear Sirs

Dean Blake -

I write with reference to my letter dated 18 August 2015 a copy of which is attached for ease.

I note from the file that this remains unanswered and as such it would be appreciated if you could respond by return.

If you have any questions please feel to contact me.

Yours faithfully


Chris Durkan
Director

Build, Protect, Manage... *your road to financial freedom starts here*

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

Date 18 August 2015

Dear Sir/Madam

Letter of Authority & Request for Details of Existing Plan

Policyholder Name: Dean Blake

Policy Holder Address: Tangled Trees, 8 Grasmere Avenue, Hullbridge, Hockley, SS5 6LF

Date Of Birth: Product: Rima freight Services Pension

Policy Number:

With regard to my client's policy, please provide me with the following details.

- The type of contract this is.
- The charging structure of the plan including the Annual Management Charge. (Including any Plan Charges sheets available).
- Name and percentage split of the fund(s) the pension is currently invested in, this is to include ISIN or SEDOL numbers.
- The alternative funds available within this contract including ISIN or SEDOL numbers
- If With-Profits, please confirm last 5 year bonus declarations and underlying asset mix (percentage in Equities/Property/Fixed interest etc)
- The current fund value of the plan.
- The current transfer value of the plan (detailing any exit penalties / MVR)
- The projected value of the fund at age **60 & 65 assuming contributions are stopped and if continued to these dates if premiums are currently being paid.**
- Does the contract facilitate adviser charging? If so projections should include an initial adviser charge of 3% and an ongoing charge of 1% per annum.
- Please provide this at assumed growth rates after inflation has been taken into account
- If an occupational pension plan please provide details of any protected tax free cash entitlement at A-day and fund value at A-day.
- Please confirm what charges are currently being taken from the plan
- Is there any life cover included in this plan?
- If the policy is a Section 32 Buy Out plan please detail any GMP and / or Section 9(2b) Rights, that may exist.
- Please clarify if there are any guaranteed annuity rates applicable to this policy, and if so what the guaranteed rates are.
- Details of death benefits – ie whether a return of fund or return of premiums is paid.
- Does the contract offer the facility to take an Uncrystallised Funds Pension Lump Sum and / or income?
- Does the contract allow the client to convert to flexi-access drawdown from 6th April 2015?
- **Please send me the forms to transfer this pension to another provider.**

I would appreciate the above information as soon as possible. My client has provided me with authority to request this information now, and for any more information I may need on this policy in future. This attached for your records. I am happy for the information to be emailed to chris@coachhousewealth.co.uk

Yours faithfully

Chris Durkan
Financial Adviser

Tangled Trees
8 Grasmere Avenue,
Hullbridge,
Hockley,
Essex,
SS5 6LF

3 August 2015

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

Dear Sirs

Re Dean Blake - SSAS

Please take this as written authority to release information on the above policy to Coach House
Wealth Solutions Limited.

This should include copy documents relating to the setting up of the scheme, fund & transfer values,
illustration of benefits, charges and investment choices.

Yours faithfully

A handwritten signature in black ink, appearing to be 'Dean Blake', written over a horizontal line.

Dean Blake