

# Savings Statement

1 October 2021

## INTELLIGENT FINANCE®

J31BA2008CMMAA0000000269001003000

Mr Rhodri Thomas and Mrs Suzanne Thomas  
St Crispin 8 Eastgate  
COWBRIDGE  
Vale of Glamorgan  
CF71 7DG

PLAN NUMBER P924980305  
STATEMENT NUMBER 52  
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### Savings

NAME Rhodri Thomas  
JAR NAME Rhodri Mini ISA  
ACCOUNT NUMBER 07769355  
SORT CODE 11-91-15  
IBAN GB38 HLFX 1191 1507 7693 55  
BIC LOYDGB2L  
JAR TYPE CASH ISA

DATE	DESCRIPTION	IN	OUT	BALANCE £
2 Sep 2021	BALANCE BROUGHT FORWARD FROM PREVIOUS STATEMENT			3.39
1 Oct 2021	BALANCE CARRIED FORWARD TO NEXT STATEMENT			3.39

#### Your Current Interest Rate

AER**%	Gross%
0.01	0.01

I Certify That this is a true copy of the  
Original document which I have  
witnessed and any picture bears a true  
likeness to the Client.

FCA No:536087

Adrian Shakespeare IFA  
Wealthmasters Financial Management,  
Atlantic House, Charnwood Park,  
Bridgend CF31 3PL 12/11/21

Telephone 0345 609 4343 Website [www.if.com](http://www.if.com) P.O. Box 890, Leeds, LS1 8UG

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# Savings Statement

1 October 2021



## Savings

PLAN NUMBER  
STATEMENT NUMBER  
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NAME  
JAR NAME  
ACCOUNT NUMBER  
SORT CODE  
IBAN  
BIC  
JAR TYPE

Rhodri Thomas  
Rhodri Mini ISA  
07769355  
11-91-15  
GB38 HLFX 1191 1507 7693 55  
LOYDGB2L  
CASH ISA

**Your Interest Rate up to 15 September 2021**

AER*%	Gross%
0.05	0.05

\* AER stands for Annual Equivalent Rate and illustrates what the interest would be if interest was paid and compounded once each year. We will pay your interest gross, this means no tax will be deducted.

Dependent on your personal circumstances tax may be due on the interest and it is your responsibility to disclose and pay any tax due directly to HMRC. Under the Personal Savings Allowance each customer will receive a tax-free allowance on interest earned (up to threshold limits). Any interest earned beyond the allowance will be subject to tax at the rates specified by law.

If you only hold savings with Intelligent Finance you will be paid interest at the rate stated. If your savings are held together with other products in your Intelligent Finance Plan you may be offsetting (either minimising or maximising). Please refer to your Plan conditions or [www.if.com](http://www.if.com) for an explanation of offsetting.



## Savings

NAME  
JAR NAME  
ACCOUNT NUMBER  
SORT CODE  
IBAN  
BIC  
JAR TYPE

Rhodri Thomas and Suzanne Thomas  
Joint Deposit  
07769363  
11-91-15  
GB16 HLFX 1191 1507 7693 63  
LOYDGB2L  
DIRECT ACCESS SAVINGS

DATE	DESCRIPTION	IN	OUT	BALANCE £
2 Sep 2021	BALANCE BROUGHT FORWARD FROM PREVIOUS STATEMENT			0.00
1 Oct 2021	BALANCE CARRIED FORWARD TO NEXT STATEMENT			0.00

# Savings Statement

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## INTELLIGENT FINANCE®



### Savings

PLAN NUMBER	P924980305
STATEMENT NUMBER	52
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NAME	Rhodri Thomas and Suzanne Thomas
JAR NAME	Joint Deposit
ACCOUNT NUMBER	07769363
SORT CODE	11-91-15
IBAN	GB16 HLFX 1191 1507 7693 63
BIC	LOYDGB2L
JAR TYPE	DIRECT ACCESS SAVINGS

#### Your Current Interest Rate

AER*%	Gross%
0.01	0.01

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### Savings

NAME	Rhodri Thomas and Suzanne Thomas
JAR NAME	Rod and Sue Isaver
ACCOUNT NUMBER	09771011
SORT CODE	11-91-15
IBAN	GB40 HLFX 1191 1509 7710 11
BIC	LOYDGB2L
JAR TYPE	isaver

DATE	DESCRIPTION	IN	OUT	BALANCE £
2 Sep 2021	BALANCE BROUGHT FORWARD FROM PREVIOUS STATEMENT			0.11
1 Oct 2021	BALANCE CARRIED FORWARD TO NEXT STATEMENT			0.11

# Savings Statement

1 October 2021



Savings

PLAN NUMBER  
STATEMENT NUMBER  
PAGE

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NAME  
JAR NAME  
ACCOUNT NUMBER  
SORT CODE  
IBAN  
BIC  
JAR TYPE

Rhodri Thomas and Suzanne Thomas  
Rod and Sue isaver  
09771011  
11-91-15  
GB40 HLFX 1191 1509 7710 11  
LOYDGB2L  
isaver

## Your Current Interest Rate

AER*%	Gross%
0.01	0.01

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Savings

NAME  
JAR NAME  
ACCOUNT NUMBER  
SORT CODE  
IBAN  
BIC  
JAR TYPE

Suzanne Thomas  
Sue ISA  
30240325  
11-91-15  
GB30 HLFX 1191 1530 2403 25  
LOYDGB2L  
CASH ISA

DATE	DESCRIPTION	IN	OUT	BALANCE £
2 Sep 2021	BALANCE BROUGHT FORWARD FROM PREVIOUS STATEMENT			4.27
1 Oct 2021	BALANCE CARRIED FORWARD TO NEXT STATEMENT			4.27

# Savings Statement

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# INTELLIGENT FINANCE®



## Savings

PLAN NUMBER	P824980305
STATEMENT NUMBER	52
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NAME	Suzanne Thomas
JAR NAME	Sue ISA
ACCOUNT NUMBER	30240325
SORT CODE	11-91-15
IBAN	GB30 HLFX 1191 1530 2403 25
BIC	LOYDGB2L
JAR TYPE	CASH ISA

### Your Current Interest Rate

AER*%	Gross%
0.01	0.01

### Your Interest Rate up to 15 September 2021

AER*%	Gross%
0.05	0.05

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Deposits held with us are covered by the Financial Services Compensation Scheme (FSCS), subject to eligibility criteria. We will provide you with an Information sheet and exclusions list every year.

For further information about the compensation provided by the FSCS, refer to the FSCS website at [www.FSCS.org.uk](http://www.FSCS.org.uk)

#### Privacy

We work hard to keep your personal data secure, which includes regularly reviewing our privacy notice. When there is an important change we will remind you to take a look, so you are aware how we use your data and what your options are. You can find our latest privacy notice at [www.if.com/privacy](http://www.if.com/privacy) or ask for a copy on 0345 609 4343.