

Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

RECEIVED
10 NOV 2017

9th November 2017

Re: Winterthur Pension Scheme – Mr Patrick Stevens – PSTR00835666RG

Dear Sir/Madam

Please find enclosed a Letter of Authority for our Client stated above.

Please can the following be sent to us as soon as possible.

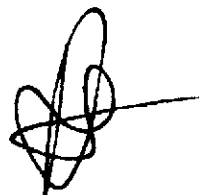
- Current Value
- Transfer Form
- Contribution History
- Projection to the age of 65
- Fund List Available within Plan
- Scheme Charges
- Details of any guarantees / bonuses

If any of the points are not applicable to the account, please can you let us know. Please can you answer all of the points so we can update our records accordingly.

Please note that there will be a transfer request for the Client to transfer some money into this pension.

If you should have any queries, please do not hesitate to contact us on 01684 851224.

Yours sincerely,



Amy Slade
Financial Administrator

Enc.

First Floor Offices • 6-8 Kenn Road • Clevedon • North Somerset • BS21 6EL
Tel • 01275 340324 • Fax • 01275 876417 • Web • www.abacusmml.co.uk • Email • info@abacusmml.co.uk

Letter of Authority



| | |
|---|---|
| Company Name Pension Practitioner | Policy Holder Mr Patrick Stevens |
| Company Address 48 Chorley New Road, Bolton, BL1 4AP. | Policy Holder's Address 38 Roundwood Park Harpenden, Hertfordshire. AL5 3AF |
| Policy Number(s) and any others I/we may hold with your company: Winterthur Pension Scheme : WINTER PSTR 00835666 RG | |

- ☒ I/We confirm that I/we hereby authorise Abacus Money Management, 6-8 Kenn Road, Clevedon, Somerset, BS21 6EL to act solely on my/our behalf in respect of the above numbered policy/plan. This letter of authority is to remain in place until I/we cancel it in writing.
- ☒ Please transfer all servicing rights to Abacus Money Management Ltd with immediate effect.
- ☒ Please supply information as indicated below to Abacus Money Management Ltd.
- ☒ Please ensure all renewal commission is paid to Abacus Money Management Ltd.

Life Policy

- ☐ Surrender Value
- ☐ Illustrated Maturity Value
- ☐ Commencement Date
- ☐ Maturity Date
- ☐ Sum Assured
- ☐ Bonuses To Date
- ☐ Trust Details

Investments

- ☐ Current Fund Value
- ☐ Surrender Value
- ☐ Commencement Date
- ☐ Contribution & Withdrawal History
- ☐ Bonuses To Date
- ☐ Fund List Available

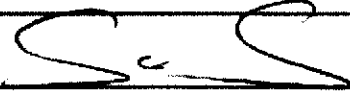
Pension Policy

- ☒ Current Fund Value
- ☒ Current Transfer Value
- ☒ Illustration of Benefits at NRD
- ☒ Illustration of Benefits at 65
- ☒ Commencement Date
- ☒ Death Benefits / Nominations
- ☒ Trust Details
- ☒ Charges Details
- ☒ Contribution & Withdrawal History
- ☒ Fund List Available

Other

- ☐ Details of Renewal Commission
- ☒ Transfer Papers
- ☐ Mortgage Account Information

For internal use only

| | |
|--|-----------------------|
| Signed  | Date 8/11/2017 |
| Signed | Date |