

► FSCS reference PB22-RACB

Please quote our reference when contacting us



Retirement Capital
Office 12
Venture Wales Building
Merthyr
Tydfil
CF48 4DR

0000040



Financial Services
Compensation Scheme

Call
0800 678 1100 (free)

Email
claims@fscs.org.uk

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
www.fscs.org.uk

► 7 November 2023

Dear Sir or Madam

We need some information from you

- We're dealing with a claim from Mrs Kathryn Barlow about their SIPP.
- We need full, up-to-date details to consider their claim.

The customer's details

Name: Mrs Kathryn Barlow

Date of birth: 20 September 1963

National Insurance (NI) number: NE238261B

Address: 11 Manor Close, Buxton, Norwich, Norfolk, NR10 5HR.

Where you are in the claims process

- Making first contact
- Completing the application
- Investigating the claim
- Getting the decision
- Dealing with any issues

We wrote to you on 10 October 2023 and 24 October 2023 about Mrs Kathryn Barlow's claim. As we haven't heard from you, we enclose a copy of their permission to allow you to send us this information. As you know, our rules say that firms must deal with FSCS in an open, collaborative and timely way.

that firms must deal with FSCS in an open, collaborative and timely way.

The information we need

- A copy of the original application forms and/or investment application forms.
- The full history of any IFAs associated with the plan including dates, their address and their SIB/FSA/FCA number - specifically confirmation of who sold the plan and any investments held.
- A schedule showing the assets currently held along with their value (and where applicable, the unit holding) of each.



Any questions?

If you have any questions, please call us on **0800 678 1100** or email **claims@fscs.org.uk**, quoting the claim reference - **PB22-RACB**. We'll be happy to help.

Yours faithfully,

Customer Services Team



● FSCS reference PB22-RACB

Please quote our reference when contacting us

Representative reference 107148



Financial Services
Compensation Scheme

Retirement Capital
Office 12
Venture Wales Building
London
Merthyr
CF48 4DR

Call
0800 678 1100 (free)

Email
claims@fscs.org.uk

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
fscs.org.uk

● 10 October 2023

Dear Sir or Madam

We need some information from you

- We are dealing with a claim from Mrs Kathryn Barlow about their SIPP.
- We need full, up-to-date details to consider their claim.

The customer's details

Name: Mrs Kathryn Barlow

Date of birth: 20 September 1963

National Insurance (NI) number: NE238261B

Address: 11 Manor Close, Buxton, Norwich, Norfolk, NR10 5HR.

Authority from Mrs Kathryn Barlow to release information


I/we agree that FSCS, and organisations acting on its behalf, may obtain my personal data from relevant companies and people (such as the firm in default and/or its insolvency practitioner) in order to process my/our claim for compensation or pursue recovery proceedings – or otherwise for the proper exercise of its statutory functions or to comply with legal or regulatory requirements.

I/we give permission for such relevant companies and people to release such personal data to FSCS, Financial Conduct Authority (FCA) and Prudential Regulation Authority (PRA) or any successors to them and any organisations acting on their behalf.

Name: Mrs Kathryn Barlow

Signature: *KTB Barlow*

Date: *16.10.23*



Where to send the information

Please send everything to us **within 14 days** using the details at the top of this letter. You must include the claim reference - **PB22-RACB** - so we know which claim the information belongs to.

When you send the information and documents, please confirm that you have given us everything you have for this customer. If you cannot provide all the information immediately, please send it when you can and let us know when you'll be able to send the rest. If you are unable to provide anything we have requested, also please let us know.

We may have to request information again if we don't receive it within a few weeks of the request. This could lead to delays to the claim.

Any questions?

If you have any questions, please call us on **0800 678 1100** or email **claims@fscs.org.uk**, quoting the claim reference - **PB22-RACB**. We'll be happy to help.

Yours faithfully,

Customer Services Team