

Retirement Capital  
Venture Wales Building  
Merthyr Tydfil Industrial Business Park  
Merthyr Tydfil  
CF48 4DR

9th January 2024

Dear Sir/Madam

**Re: Alastair Gibson, Retirement Capital, Plan Type - SSAS, Policy Number -**

Please find enclosed a Letter of Authority from our mutual client who wishes us to review their benefits with yourselves. Accordingly, I would be grateful if you could provide us with the following information:

- Type of Scheme
- Product name
- Current fund value and transfer/surrender value including units and fund codes
- The reason(s) for any difference between fund and transfer values if necessary
- Full Contribution/Premium History including dates
- Funds list & charges
- Does the plan include any guaranteed growth rates? If so, provide details
- Any current regular withdrawals? Amount and frequency and amounts
- Any regular contributions? Amount and frequency
- Are partial transfers out allowed? If so, what is the minimum sum required to keep the plan in force?
- Details of Guaranteed Annuity Rates
- What are the retirement options?
- Is policy in drawdown?
- Do you accept transfers out via Origo?
- Can this policy accept transfers in?
- Member split %
- Is beneficiary drawdown available on death of the policy owner?
- Details of any other safeguarded benefits (GMP, PCLS higher than 25% or protected TFC- if yes please provide relevant fund value and TFC entitlement at A-Day). If there is none, please confirm in writing



No.1 Bath Quays  
1 Foundry Lane  
Bath  
BA2 3GZ

4th Floor Greenwood House  
91-99 New London Road  
Chelmsford  
CM2 0PP

Unit 1141  
Regent Court  
Gloucester Business Park  
Gloucester  
GL3 4AD

Offices 4-5, 1<sup>st</sup> Floor  
i2 Centre  
Oakham Business Park  
Mansfield  
NG18 5FB

3<sup>rd</sup> Floor  
1 Portland Place  
London  
W1B 1PN

**LETTER OF AUTHORITY / AGENCY TRANSFER**

<b>Full Name</b>	Alastair John Leigh Gibson
<b>Date of Birth</b>	5 <sup>th</sup> June 1963
<b>NI Number</b>	NI 87 30178
<b>Address</b>	Ashdown Richmond Heights Bath BA1 5QJ
<b>Financial Planner Name</b>	Nick Twist

<b>Provider &amp; Address</b>	Retirement Capital, Venture Works Building Mather Tydfill Industrial Business Park Mather Tydfill CF48 4DR
<b>Policy Number/s</b>	See Attached Register Certificate.
<b>Policy Type/s</b>	SASS

Please accept this as my written authority to:-

- ☒ Please accept this letter as my authority for the release of any information relating to the above plan and any other policies I hold to Fidelius Ltd

Please keep this letter of authority until further notice or until revoked

**Signature** MA

**Date:** 5.1.2024