

Our ref: 101258583

Your ref:

Mrs Deirdre Abram
60 Ash Grove
Beverley Road
Hull
HU5 1LU

17 July 2023

Dear Mrs Abram

Policy Holder: Mrs Deirdre Abram
Pension Policy Number: P9101161

I write with reference to your request to transfer the above numbered Wesleyan Personal Pension to the 'Abram Pension Plan SSAS'

In order to assess the requested transfer we are required to carry out due diligence on the Scheme you wish to transfer to for the protection of yourself and the Society. We would ask that you answer the following questions and return your response in the enclosed envelope.

1). What is your reason for transferring?

For example:

- " Consolidation of different pension plans
- " Lower charges in the new plan
- " Wider investment choices in the new plan
- " Higher investment performance hoped for in the new plan
- " Better administration in the new plan
- " Larger range of features and facilities in the new plan

2). Was the decision to transfer your or were you advised by a third party? If a Third Party was involved. If third party involvement please provide their details.

3). Have you sought advice from an FCA regulated adviser?

If yes, please provide details of the adviser's name and address.

Did the adviser give you a written report of their recommendations?

If you haven't taken any advice is there a reason why not (e.g. do you consider yourself to be a sophisticated investor?)

4). Once the transfer has been completed, do you know where the money will be invested in your new plan?

For example:

- " Pooled investment funds
- " Individual stocks & shares on a normal traded index ((e.g. FTSE)
- " Commercial property
- " Unit Trusts

If you require any further assistance please do not hesitate to contact us.

Yours sincerely

Mr Jeffrey Tustin
Pension Claims Team