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| Freephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com | Daws House 33-35 Daws Lane London NW7 4SD |

**Private & Confidential**  
Bryan Milton  
View Point Cottage  
Colliers Lane  
Lansdown   
Bath   
BA1 8DP

20 August 2010

Dear Bryan,

**Birchland Executive Pension Scheme**

Please find enclosed the following to allow us to conclude the takeover of your pension scheme.

Investment Authority – we will need to obtain information from time to time regarding the pension scheme and it’s investments. In particular, pension bank statements to ensure that we can adhere to our regulatory requirement as a Company service provider with HMRC. Would you please sign and return this form to me.

Identity of Trustees – we need to identify who the trustees of the scheme are to ensure that the requirements imposed on us as a Company Service Provider are adhered to. Would you please insert the address and dates of birth of your sons as co-trustees of the pension scheme; we have your details already.

Direct Debit Mandate – once we complete the takeover of the pension scheme we will send to you a trustee report and will apply to set up a direct debit in respect of the quarterly administration. Would you kindly complete and return the enclosed for this.

When returning the paperwork we will need a payment for the takeover of the pension scheme, this amounts to £650.00 plus vat as per our terms of business. You will need to raise a cheque for £763.75 made payable to Pension Practitioner .Com; we will issue you with an invoice and credit note for this once we have completed the scheme takeover.

If you have any queries in the interim please feel free to get in touch.

Kind regards

Yours sincerely

Gavin McCloskey  
**For Pension Practitioner .Com**

Company Reg No: 6028668; VAT Reg No: 894312018; HMRC Practitioner Reg No: 00005886

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