



PHOENIX LIFE

Trustees of Country Fresh Food
SSAS
C/O TAG Wealth Management
Riverdale
89 Graham Road
Sheffield
S10 3GP

Customer Contact Centre

0345 301 0160

Plan Number
AM1700X

Our reference
CEB Team 2/JAJ

12 March 2019

Dear Sirs

Request to transfer benefits to Country Fresh Food SSAS
Policy holder's name: Mrs Sandra Dowker

With regards the above transfer request.

Phoenix Life has a duty of care to act in the best interests of its customers and therefore we are unable to proceed with this transfer request until we have concluded all of our due diligence checks.

The transfer and scheme approval documentation refers to a number of companies including TAG Wealth Management, Pension Practitioner.Com Limited and Registered Scheme Administrator Limited. However the roles undertaken by these companies are not formally documented with the Trust Deed or Scheme Rules for Country Fresh Foods SSAS.

To clarify this, we require the Trustees of Country Fresh Food SSAS to provide details of the roles undertaken by these parties and where possible formal documentation of their appointment.

We require the information above to be forwarded to us for consideration as soon as possible.

We apologise for any inconvenience that this may cause, however we hope that you can understand the need for us to be vigilant in order to protect our customers from pension scams and both customers and ourselves from unnecessary tax penalties.

In the meantime if you have any queries please call our UK-based Customer Contact Centre on 0345 301 0160 between 8:30am and 5:30pm, Monday to Friday. Calls to 03 numbers cost no more than a national rate call to 01 or 02 numbers and are included in inclusive minutes and discount schemes in the same way. If calling from outside the UK, please call +44 (0)1733470470. Alternatively, you can go to the 'Contact Us' section of our website at www.phoenixlife.co.uk.

Yours sincerely



Milind Dhuru
Operations Director

If you would like this information in large print, in Braille, or on cassette or CD, please call 0345 301 0160. If calling from outside the UK please call +44 (0) 1733470470 .
