



7 July 2020

Our reference: HH\0034960711
Your reference: FAO Tina Poole

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Dear Sir/Madam

Policyholder: The Trustees Of The Kaysted Directors Pension Fund
Policy number: 8161329UT
Policy type: Executive Pension Plan EPP

Member Name: Mr J H Stedman

Thank you for your request for information about this policy.

I confirm the value for this policy as at 5 April 2020 is as follows:

- Fund Value: £46,259.85
- Loyalty Bonus: £801.24
- Transfer Value: £47,061.09

All values quoted are for information only and are not guaranteed as the funds are revalued on a regular basis and can go down as well as up.

I hope this is satisfactory for your requirements.

If you have any questions, or need more information, please contact us on 0808 168 2559 between 9am and 5pm Monday to Friday, not including bank holidays.

Yours faithfully

Harriet Halliday
Policy Administration - Aviva

Your Zurich Personal Pension Plan yearly statement

Peter Stedman

Plan number	P11199-416-DL/001	Planned retirement date (and age)	1 April 2024 (75 years)
Plan start date	1 July 1989	Statement date	7 May 2020
Plan anniversary date	1 July 2020	Statement period	4 May 2019 to 7 May 2020



Plan summary – 7 May 2020

Plan value £136,194.42

Transfer value £136,194.42



Need more help or information?

Please speak to your adviser or contact us directly.

Call us on **0370 241 6950**

Monday to Friday
8am to 6.30pm, Saturday
9.30am to 12.30pm
(except bank holidays).
We may record or monitor
calls to improve our service.

Email us at customerweb @uk.zurich.com

Write to us at Zurich Customer Services Tricentre One New Bridge Square Swindon SN1 1HN

Visit us at zurich.co.uk/mystatement

Have you checked your plan?

It's important to review your retirement savings regularly to make sure you're on track to meet your retirement objectives. If you've previously taken benefits from your plan and your circumstances or retirement plans have changed, you'll probably want to review your retirement options, your choice of pension product and fund choices.

To help you understand the options available to you, we recommend getting guidance from pensionwise.gov.uk or seeking advice from a regulated financial adviser. If you don't have an adviser then give us a call to talk through your options. You'll also find plenty of information to help you at zurich.co.uk/retirement.