HM Revenue and Customs

Pensions Schemes Services

BX9 1GH

Date: 10/09/2020

Dear Mr Bhandal,

**Max Goldberg Wealth**

**Your Ref: APSS530**

**SRN: S0000003997**

Further to my letter dated 28/07/2020, I would like to correct a statement made in point 13 of that letter (copy attached).

The information provided for Stratagem Wealth Limited is now out of date and has changed to the following:

Stratagem Wealth Management is now no longer regulated under the FCA and has been replaced with Stratagem Financial Planning, 1 Park Lane, Poynton, Cheshire SK12 1RD, Telephone 01625 839 839. FCA regulated FCA number 819330.

My position within Stratagem Financial Planning is as an Adviser. Stratagem Financial

Planning has not given advice in relation to the set-up of this SSAS. I have many

years of experience working within the financial services industry and provided this

information to demonstrate my broader experience. I am presently a registered administrator for a number of self administered schemes and have significant experience in this sector either in connection with scheme compliance or protection work for trustees in the regulated sector.

To support my role within Stratagem Financial Planning, please find enclosed the

following, together with the FCA registration of Stratagem Financial Planning:

1. An email from the Director & Chartered Financial Planner of Stratagem Financial

Planning – David Shirley, confirming my role within the company.

2. Stratagem Financial Planning website print out, detailing key members of the team.

3. Stratagem Financial Planning – email signature.

4. FCA print out confirming the registration of Stratagem Financial Planning.

I would be most grateful if this application is attended to as soon as possible.

Thank you for your support and assistance.

Yours sincerely

David Nicklin (CERT PFS)  
Director

For and in behalf of   
RC Administration Limited