



Wednesday, 12 March 2014

**PRIVATE & CONFIDENTIAL**

Tony Bayagbona  
Fenwick Solicitors  
34 Lipson Road  
Plymouth  
PL4 8PW

**RE NEW SSAS INTRODUCTION; MILLSTONE CONSTRUCTION (WALES) LIMITED**

Dear Tony

Further to our previous discussions please find attached an application in connection with the above client in addition to supporting documents. I can also confirm the following:-

The clients have received Regulated Independent Financial Advice from myself dated 12/03/2014 to set up a new Company SSAS scheme and transfer their Scottish Widows benefits into the new scheme. The clients will be utilising the scheme to arrange investments such as structured products, alternative investments such as gold as well as a company loanback facility and 3<sup>rd</sup> party loans.

I have provided:-

- Certified ID both personally and for the company
- Pension Transfer Discharge forms duly signed by the clients
- Your scheme opening application.

The client has been quoted the following set up fees to be deducted from the transferred funds:-

Advice fees of 2% of the gross transferred balance	= <b>£2,550</b> payable to Wealthmasters
Set Up Fees of £750 + additional member £220	= <b>£970</b>
Annual Admin payable in Arrears £1,200 + £220	= <b>£1,420 + Vat</b>

I trust the content meets your requirements and should you need any additional information please do not hesitate to contact me.

Yours faithfully

Adrian Shakespeare Dip PFS, Cert's CII (MP & ER)  
**Principal Consultant**

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