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PENSION PRACTITIONER
Office 12 Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

Date of this letter
18 December 2020
Plan number
858LY760
Scheme Name
VICTORIA BAKERY
Member
DEBORAH FREEMAN

Plan information

Dear Sir or Madam

Thank you for your recent enquiry.

Please find enclosed the following :

- A current valuation

If Mrs DEBORAH FREEMAN wishes to transfer the value of her plan(s) to another provider then we highly recommend that she seek independent financial advice.

Retirement Options

The member's pension is part of a trust-based pension scheme, which means you choose which retirement options are available to scheme members. Details of the various options that may be available under this plan can be found in the enclosed retirement brochure. ANNB10422 (Decisions, Decisions - what you can do with your pension)

We're here to help

If you need more information or have any questions, please contact us and we'll be happy to help. So that we can deal with your queries quickly and efficiently, please quote the reference shown at the top of this letter.

Current values

Plan number
858LY760
Scheme Name
VICTORIA BAKERY
Member
DEBORAH FREEMAN

Please read the 'Important notes' section at the end of this document.

The values quoted are correct as at 5 April 2020.

Plan number	Plan type	Fund value	Transfer value	Current regular contribution
858LY760	Unit Linked	£121,769.57	£121,769.57	£300.00

Important notes

The values shown are not guaranteed and can go down or up depending on investment performance.

Fund value

The fund value is the current value of the member's plan before any deductions are included. It's equal to the value of the benefits held in the member's chosen investment fund(s).

Transfer value

The transfer value is the amount that would be paid if the plan were to be transferred to another provider. Please note that if the member were to decide to proceed with a transfer, the amount we'd pay would be equal to the transfer value of the plan as at the date we receive all of our requirements to process the transfer.

We can only pay the transfer value to another UK registered pension scheme or to a Qualifying Recognised Overseas Pension Scheme (QROPS).

