



Georgina Stuliglowa <georginas@pensionpractitioner.com>

FW: AJ Bell Youinvest - Mr Henry Jodrell Re WWP Trustee Scheme - ABCFXF

Adam Holmes <adam@carltonjames.co.uk>
To: Georgina Stuliglowa <georginas@pensionpractitioner.com>
Cc: David Nicklin <davidn@pensionpractitioner.com>

22 May 2020 at 12:06

Dear Georgina

Please see the below email regarding Mr Jodrell's WWP Trustee Scheme dealing account, as per your request.
Could we please progress the payment ASAP.

Kind Regards

Adam Holmes

Paraplanner

Carlton James

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Company Registration Number: 09074495

From: New Business Youinvest <newbusiness@youinvest.co.uk>
Sent: 29 April 2020 15:28
To: 'hjodrell@btinternet.com' <hjodrell@btinternet.com>
Subject: AJ Bell Youinvest - Mr Henry Jodrell Re WWP Trustee Scheme - ABCFXF

Dear Mr Jodrell

Re: Mr Henry Jodrell Re WWP Trustee Scheme - Pension Scheme Account

Thank you for your application and for choosing AJ Bell Youinvest. I would like to take this opportunity to welcome you as a customer.

The account number for your new account is:

Your Registered Pension Scheme Dealing Account – ABCFXF

Please use your account number in all correspondence with us.

To access your Registered Pension Scheme Dealing Account, please do so via your already existing dealing account (**account number A65756, username henry@jordrell.org.uk**)

An application summary containing the information you entered in the application is now included in the 'my documents' section of our website. This summary also contains the declarations you have made, which form the basis of your application. Please login to the secure area of our website to review the information and declaration; if there are any errors, please let us know within 30 days.

Instructions on how to use the dealing site are available on our website. To access the dealing area simply login through our website, click the 'deal' icon under your product, and this will allow you to get started. There is also a help section in the dealing area.

To transfer an existing dealing account, please send us a signed transfer form. The form can be accessed under the 'Manage my dealing account' and the 'Move an existing dealing account to AJ Bell Youinvest' section. When we receive your signed form, we will contact your current provider to ensure the transfer is started as quickly as possible.

If you make a transfer from an existing plan, you need to be aware that there may be times when your funds may be at risk from, or you may be unable to take advantage of, movements in investment markets. Your plans are your responsibility and so we would encourage you to keep in contact with your current provider throughout the transfer process. By doing so you will be kept up to date on the progress of the transfer. Upon receipt of the transfer proceeds, we will send you confirmation to say the transfer is complete.

You may be aware that many fund managers offer a range of differently price share classes in each of the funds which they offer. If you choose to initiate an in specie transfer, please note that, once the transfer has completed, if we find that you have holdings in a fund where the fund manager offer a 'cleaner' or cheaper alternative on our platform, we will automatically convert your holdings to that share class. The conversion to the cleanest share class will not incur any fees.

If there is no cleaner equivalent, we will hold the fund in its existing share class, but will be entitled to convert it to a cleaner share class if one is created in the future.

Further information about clean funds can be found on our website: www.youinvest.co.uk/CleanFunds

You can view and download our key features, terms & conditions and the current charges and rates from the 'useful forms' section of our website: www.youinvest.co.uk

If you need any help using our dealing service, you can telephone our dedicated dealing helpline on 0345 37 33 479. For all other enquiries, please contact our customer management team at enquiry@youinvest.co.uk or by telephone on 0345 54 32 600.

Yours sincerely

Joseph Greenwood

Customer Services Manager

Youinvest New Business |
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Website: www.youinvest.co.uk

