

ANDREW HEYES WEALTH MANAGEMENT

Associate Partner Practice of St. James's Place Wealth Management

Hulmes Bridge Business Centre
North Moor Lane
Halsall
Ormskirk L39 8RF
01704 335068 | 07715 937702



ST. JAMES'S PLACE
WEALTH MANAGEMENT

Retirement Capital
18 Soho Square
London
W1D 3QL

31st May 2022

Dear Sirs,

Account Holder: 000064000000K&SAbols Account Holder Name: K Abols Ltd
Member/Policyholder: Kevin Abols, 16 Windsor Road, Formby L37 6DY
Date of Birth: 30th November 1984

Please find enclosed a letter of authority duly signed by our mutual client and Trustee of the Scheme Mr Kevin Abols which should enable you to release information for this policy.

Therefore, please kindly provide me with the following information in writing:

1. What is the Current and Transfer Value of the policy? Where there is a difference, please provide details of any Exit Charges, or for With Profits plans, details of any MVA or Terminal Bonuses.
2. Please provide a full transaction history for the policy. This should confirm details and dates of all Single and Regular contributions, as well as details of any Transfers in.



Chartered

ANDREW HEYES APFS

Associate Partner of Andrew Heyes Wealth Management

Partners: Andrew Heyes Elaine Heyes

andy.hey@sjpp.co.uk www.andyhey@sjpp.co.uk

The Partner Practice is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the group's wealth management products and services, more details of which are set out on the group's website www.sjp.co.uk/products. The 'St. James's Place Partnership' and the titles 'Partner' and 'Partner Practice' are marketing terms used to describe St. James's Place representatives.



3. If this plan contains any element of With Profit Funds, Guarantees, Safeguarded Benefits or Loyalty Bonuses please provide Projections based on the following scenarios:
- Benefits at age 67 assuming that no further contributions are payable.
 - Benefits at age 67 assuming that contributions continue at the current level.
 - If contributions have ceased within the last 6 months, a projection of benefits at age 67 assuming that contributions are reinstated from the date of illustration.
4. Does the Plan Contain Any Protected Tax-Free Cash? If yes, please provide the Re-Valued Protected Tax-Free Cash at Todays Date or the A day Tax-Free Cash and Fund Values.
5. Has this policy received a Transfer in that contained Protected Tax-Free Cash? If yes, please provide the Re-Valued Protected Tax-Free Cash at Todays Date or the A day Tax-Free Cash and Fund Values.

Thank you for your assistance in this matter.

Yours faithfully,

Andrew Heyes
Partner of the St. James's Place Partnership

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For The Attention of Andrew Heyes

I hereby authorise you to approach the companies listed below to obtain all information that you require regarding my existing policies with them. I understand that you are a representative of the St. James's Place Group (and not an independent financial adviser) and therefore will not be providing advice on these policies, but that you need this information in order to ensure that the full details of the policies are taken into account when making any future recommendations regarding the products and services offered by the St. James's Place Group.

<u>Name of Company</u>	<u>Policy Details</u>
PETREMENT CAPITAL	KABOLS LTD.
	000064000000K+S ABOLS
	UK 11223320009669.

Yours sincerely,

Signed: K. D. 23.5.22
(Date)

Name: KEVIN ABOLS. / TRUSTEE / MEMBER.

Address: 16 WINDSOR ROAD
ROCMBY
L37 6DU

Date of Birth: 30.11.84

NI Number: JK 151290C.