

Retirement. Capital  
Venture Wales Building  
Merthyr Tydfil Industrial Business Park  
Merthyr Tydfil  
Wales  
CF48 4DR

4<sup>th</sup> January 2023

Dear Sir or Madam

**CLIENT'S NAME: PIYUSHKUMAR N AMIN**  
**SCHEME NAME: BLACKWELL CHEMIST LIMITED DIRECTORS PENSION SCHEME**  
**POLICY NUMBER: A0110689**  
**NATIONAL INSURANCE: WL 92 33 78 B**

We have been instructed to carry out a review of our above client's pension arrangements and would appreciate you providing us with the following information at your very earliest opportunity:

- type of scheme e.g. company plan, retirement annuity, personal pension, stakeholder, with-profits, or unit-linked employed or self-employed
- PSTR reference numbers for each scheme
- scheme commencement date and normal retirement date for the/each member
- unit allocation statement
- if unitised, please advise specific charging basis for the plans
- current cash transfer value
- current plan value, if different (to be split between LPI and non LPI)
- current death value, if different
- current premium and premium history including any transfers-in or additional voluntary contribution payments
- terms that would apply if premiums are discontinued i.e. are there any additional charges
- **if with-profits, please advise how terminal bonus is calculated and what current rates would apply in the event of:**
  - **transfer to another scheme**
  - **early retirement**
  - **maturity at normal retirement age**
- if traditional with-profits, please advise:
  - basic sum assured and bonus accrued to date
  - the reduction to contract guarantees and/or bonuses that would apply (if any) on discontinuance of premiums

- confirmation of whether a guaranteed annuity rate applies to the policy
- the date of the trust deed establishing the scheme and the scheme's constitution i.e., centralised/non-centralised
- confirmation of whether a guaranteed minimum bonus applies to the policy
- is there any pension sharing provisions in place?

A copy of our client's authority is enclosed and we would also be grateful if you will forward the relevant transfer discharge form(s) and notify us of your transfer requirements. Furthermore, please confirm **whether or not you hold any other pension plans for this client.**

### **Timescale**

Please acknowledge receipt of this letter by return, indicating the likely timescale by which you will be able to respond to the above.

Yours faithfully



Dylan Vadher  
dylan.vadher@mattioliwoods.com

Enclosure

Retirement. Capital  
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Merthyr Tydfil  
Wales  
CF48 4DR

Mattioli Woods PLC  
1 New Walk Place  
Leicester  
LE1 6RU

Dear Sirs

**POLICY NUMBER/POLICIES NUMBERED:** Tax Ref: 00768806RS / Scheme Admin ID: A0110689  
**SCHEME NAME:** Blackwells Chemist Limited Directors Pension Scheme  
**NATIONAL INSURANCE NUMBER:** WL923378B - Piyushkumar N Amin

Please accept this letter as my authority for you to provide Mattioli Woods plc, 1 New Walk Place, Leicester, LE1 6RU (FCA number 220743) with any information requested in connection with any policies I may hold, until further notice.

Yours faithfully

Piyushkumar N Amin



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Date: 4 - 1 - 2023