



MONEY AND ME SOLICITORS

Here for your financial justice

Unit 7, Olympic Park
Olympic Way
Warrington, Cheshire
WA2 0YL

Tel: 01925 859625

Date: 22/01/2024

Our Ref: SW/RD/6858
Your Ref:

Retirement Capital
Office 12
Venture Wales Building
Tydfil
Merthyr
CF48 4DR

Dear Sirs

Client: Miss Jacqueline Rohan
Policy Number: PB22-QH6V
DOB: 4 December 1962

Claim for compensation via the Financial Services Compensation Scheme (FSCS)

We are currently acting for the above client as they believe they have been mis sold a pension.

We have submitted a claim for compensation to the FSCS on their behalf. In order to assist the client in their claim we would be grateful if you could provide the client with the information as per the attached Letter.

Should you have any queries please do not hesitate to contact us and we will be happy to assist.

Please acknowledge receipt of this letter by email to info@moneyandmesolicitors.co.uk

Yours sincerely

David Miller

David Miller
Director

Money and Me Solicitors is a trading name of Money and Me Solicitors Limited which is authorised and regulated by the Solicitors Regulation Authority as a Licensed Body Alternative Business Structure (ABS) under Authorisation number: 670274 and is also registered with the Information Commissioner's Office.

Money and Me Solicitors Limited is a company incorporated in England and Wales under the Companies Act 2006 and under Company Registration number: 12552029.

Registered Office: Unit 7, Olympic Park, Olympic Way, Warrington, Cheshire, WA2 0YL.
Branch Office: Unit 75, Fountain Business Centre, Ellis Street, Coatbridge, ML5 3AA.

● FSCS reference PB22-QH6V

Please quote our reference when contacting us



Financial Services
Compensation Scheme

Retirement Capital
Office 12
Venture Wales Building
London
Tydfil
Merthyr
CF48 4DR
United Kingdom

Call
0800 678 1100 (free)

Email
claims@fscs.org.uk

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
fscs.org.uk

18 JAN 2024

● 10 January 2024

Dear Sir or Madam

We need some information from you

- We are dealing with a claim from Miss Jacqueline Rohan about their Pension.
- We need full, up-to-date details to consider their claim.

Here is signed permission from Miss Jacqueline Rohan which authorises you to release details of their policy. As you know, our rules say that firms must deal with FSCS in an open, collaborative and timely way.

The customer's details

Name: Miss Jacqueline Rohan

Date of birth: 4 December 1962

National Insurance (NI) number: NA549543C

Address: Cherrytree Cottage, Ingleby Arncliffe, NORTHALLERTON, North Yorkshire, DL6 3LN

Previous address: 17 Thirsk Road, Yarm, Stockton on Tees, TS15 9HD

Authority from Miss Jacqueline Rohan to release information

I/we agree that FSCS, and organisations acting on its behalf, may obtain my personal data from relevant companies and people (such as the firm in default and/or its insolvency practitioner) in order to process my/our claim for compensation or pursue recovery proceedings – or otherwise for the proper exercise of its statutory functions or to comply with legal or regulatory requirements.

I/we give permission for such relevant companies and people to release such personal data to FSCS, Financial Conduct Authority (FCA) and Prudential Regulation Authority (PRA) or any successors to them and any organisations acting on their behalf.

Name: Miss Jacqueline Rohan

Signature:

Date:

14.1.2024

The information we need

- Confirmation of the status of the fund/investment– i.e. is it an on-going concern, wound up, in administration, in liquidation etc.
- Is the fund/investment liquid or illiquid?
- If the fund/investment is illiquid, please confirm the reason for this – e.g. due to the fund being a closed ended investment fund or because redemptions have been suspended
- Any information relating to when the fund/investment is likely to become liquid again, e.g. maturity date
- The current Net Asset Valuation and the date of this valuation
- The frequency at which valuations take place and the NAV is published
- Confirmation of where the latest NAV can be obtained on an on-going basis, e.g. from a webpage
- The last fund/investment Valuation Report
- The original prospectus or information memorandum.
- Would the fund/investment be classified by the Financial Conduct Authority (FCA) as a UCIS (Unregulated Collective Investment Scheme)?

Where to send the information

Please send everything to us **within 14 days** using the details at the top of this letter. You must include the claim reference - **PB22-QH6V** - so we know which claim the information belongs to.

When you send the information and documents, please confirm that you have given us everything you have for this customer. If you cannot provide all the information immediately, please send it when you can and let us know when you'll be able to send the rest. If you are unable to provide anything we have requested, also please let us know.

We may have to request information again if we don't receive it within a few weeks of the request. This could lead to delays to the claim.

Any questions?

If you have any questions, please call us on **0800 678 1100** or email claims@fscs.org.uk, quoting the claim reference - **PB22-QH6V**. We'll be happy to help.

Yours faithfully,

Customer Services Team

● FSCS reference PB22-QH6V

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Yours faithfully,

Customer Services Team



22nd January 2024

James Brearley
7 South Preston Office Village
Cuerden Way
Bamber Bridge
Preston
PR5 6BL

Dear Sirs

Phoenix Pension Fund 2113595 - A/C W2087 - S Collier

Please take this letter as the Trustees' authority to pay the residual cash balance in the above account to the Trustees.

The proceeds should be paid into the Trustees' bank account:

Account Name:	(Pension Funds Of) Quantum Actuarial LLP Re Phoenix Pension Fund
Branch Sort Code:	401836
Account Number:	81696130
IBAN:	GB67HBUK40183681696130
UK Swift/BIC:	HBUKGB4B

I would be grateful if you could confirm the amounts realised from the account. The email address is nickboyes@able-governance.co.uk.

If you have any questions about this instruction, please contact Nick Boyes as soon as possible.

Yours faithfully


NICK BOYES
ABLE GOVERNANCE LTD



PAUL DAVIES
CRANFORD TRUSTEES LIMITED