Gmail

Greg Vaughan Financial Services <greg-vaughanfinancialservices@gmail.com>

ENCRYPT Complaint Reference: [redacted] - Your Reference [redacted] - Policyholder: [redacted]

GNEWCOM@aviva.com <GNEWCOM@aviva.com> 24 July 2025 at 12:34
To: greg@greg-vaughan.co.uk

AVIVA

| Retirement | Investments | Insurance | Health |

Private and Confidential
. Greg Vaughan Financial Services
Sent via email: greg@greg-vaughan.co.uk

Please Contact Andrew Novell
Tel Number 0800 068 7719
We're open 9am to 5pm Monday to Friday
Email Address GNEWCOM@AVIVA.COM
Visit our website at **Aviva.co.uk**

Complaint Reference: [redacted]
Please quote this number on all correspondence.

24 July 2025

Dear Greg Vaughan Financial Services

Policy Number: [redacted] Policyholder: [redacted]
Your Reference: [redacted]

Following their acceptance of our offer, we have today authorised a payment of £32,533.43 (including growth of £245.57) to your client's chosen account.

This should credit within three to five working days.

Yours sincerely

Andrew Novell
Sales Complaints Investigator

Calls to 0800 numbers from UK landlines and mobiles are free. The cost of calls to 03 prefixed numbers are charged at national call rates (charges may vary dependent on your network provider) and are usually included in inclusive minute plans from landlines and mobiles. For our joint protection telephone calls may be recorded and/or monitored.

Members of the Association of British Insurers

Aviva Life & Pensions UK Limited. Registered in England No. 3253947. Registered Office: Aviva, Wellington Row, York, YO90 1WR. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm Reference Number 185896.

Aviva UK Life
Sales Complaints
PO Box 904
Sheffield, S11 8LF

PHOENIX LIFE
Part of Phoenix Group

phoenixlife.co.uk
Email: complaints.support@phoenixlifesupport.co.uk
Complaints: +44 (0)203 353 8979
From overseas: +44 (0) 1256 841414
Monday to Friday: 9:00 am - 5:00 pm
Phoenix Life
PO Box 7019
Basingstoke RG24 4LY

[redacted]

Our Ref: [redacted]

9 June 2025

Dear [redacted]

Plan Number: [redacted]

Putting things right

When something goes wrong, we want to put it right and stop it from happening again, so thank you for taking the time to get in touch and for returning the form accepting our offer to put things right for you.

I have enclosed a cheque for £3,413.80.

This is to put things right after you told us you had concerns about your plan. Because you have accepted our offer, we will not make any more payments to you.

We are here to help

If you have any questions or need more information, please get in touch. You will find my contact details at the top of this letter.

If you would like this information in large print, braille or audio please call 0345 072 0223. If calling from outside the UK please call +44 (0)1256 841414.

Yours sincerely

Elizabeth Bacon
Complaints Support

Enc: Cheque for £3,413.80

CC: Copy to Greg Vaughan Financial Services

Phoenix Life CA Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Phoenix Life CA Limited is registered in England No. 959082 and has its registered office at 1 Wythall Green Way, Wythall, Birmingham, B47 6WG. Phoenix Life CA Limited uses the Phoenix Life brand under licence.

ACCEPTANCE FORM

Aviva Ref: [redacted]

Policy Number: [redacted]

I refer to Aviva's correspondence of 5 June 2025 and the revised offer of £30,357.34. I confirm I accept the payment in the method indicated below. I acknowledge and accept that the offer is made in full and final settlement of all claims I have relating to the advice received to take out the FSAVC policy numbered above.

I would like £30,357.34 to be paid to me as a lump sum.

Yes / No

Please complete your chosen method of payment below, then sign and date. Send to: Aviva UK Life, Sales Complaints, PO Box 904, Sheffield, S11 8LF. Alternatively, you can email a PDF copy of the fully completed form to gnewcom@aviva.com

Account Holder Name: [redacted]

Bank/~~Building Society~~ Name: [redacted]

Sort Code: [redacted] **Account No:** [redacted]

Building Society Roll No: [redacted]

(If applicable)

If the above account is unknown to Aviva we may need to carry out a routine electronic third-party check (the quickest way to verify your identity).

If you don't want us to carry out this check please enclose an original (or certified copy) of a statement for this account dated within the last six months.

If we don't receive a bank statement, the electronic check will be carried out.

Signed: [redacted] Date: 5/6/25

Name: [redacted]

FSCS reference [redacted]

Please quote our reference when contacting us

Representative reference [redacted]

[redacted]

fscs

Financial Services Compensation Scheme

Call
0800 678 1100 (free)

Email
claims@fscs.org.uk

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
www.fscs.org.uk

31 March 2025

Dear [redacted]

We will pay you compensation

- You have a valid claim against Exchequergate Limited (the Firm).
- This means we can pay you **£12,670.00** in compensation.

Where you are in the claims process

- Making first contact
- Completing the application
- Investigating the claim
- Getting the decision
- Dealing with any issues

How much you'll receive

We have calculated your total loss as **£12,670.00**.

Amount we are able to pay under our rules	£12,670.00

How and when you'll receive your payment

We'll check the bank account information you gave us. If everything's in order, we'll pay the compensation directly into the account. If we can't, we'll pay you by cheque. You should receive the payment within 10 working days of the date at the top of this letter.

You might need to pay tax on your compensation, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

If you receive any means-tested benefits (such as Universal Credit) this compensation may affect your eligibility to claim those benefits. FSCS cannot provide you with advice or guidance on means-tested benefits. If you're concerned about how this affects you, you should seek independent advice. For free impartial guidance on means-tested benefits, contact a Citizens Advice Bureau, visit the MoneyHelper website or visit www.gov.uk/browse/benefits.

Financial Services Compensation Scheme Limited
Registered as a Limited Company in England and Wales No 3943048
Registered office: 10th Floor, Beaufort House, 15 St Botolph Street, London EC3A 7QU

Tel: 0800 032 9115
Lines open: Monday to Friday, 9am to 5pm
For Textphone: Dial 18001 first
We may record and/or monitor your
calls for training and audit purposes

[redacted]

Our Ref: LVL[redacted]
Your Ref:[redacted]

17 March 2025

SETTLEMENT LETTER

Dear [redacted]

Your Free Standing Additional Voluntary Contribution Plan: [redacted]

Thank you for returning the signed Acceptance Form in response to our offer of redress set out in our letter dated 25 February 2025.

A payment for £1,234.88 has been forwarded to your bank separately in full and final settlement of your complaint. Please allow 7 to 10 working days for the payment to arrive.

If you've any questions in the meantime, please get in touch. You can email me at Sara.Christopher@lv.com or call me on 0800 032 9115. I'm here to help.

Yours sincerely

Sara Christopher
Customer Relations Officer
LV=

Cc Greg Vaughan – Greg Vaughan Financial Services

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41914-2023

FSCS reference [redacted]
Please quote our reference when contacting us
Representative reference [redacted]

[redacted]

fscs
Financial Services Compensation Scheme

Call
0800 678 1100 (free)
Email
claims@fscs.org.uk
Write
PO Box 300
Mitcheldean
GL17 1DY
Visit
www.fscs.org.uk

26 March 2025

Dear Mrs Beeken

We will pay you compensation

- You have a valid claim against Jones & Brunt Limited (the Firm).
- This means we can pay you **£21,385.89** in compensation.

How much you'll receive

We have calculated your total loss as **£21,385.89**.

Amount we are able to pay under our rules	£21,385.89

How and when you'll receive your payment

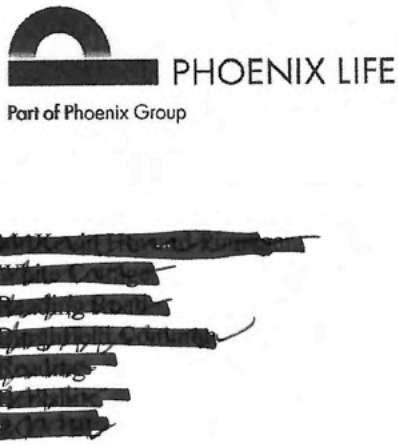
We'll check the bank account information you gave us. If everything's in order, we'll pay the compensation directly into the account. If we can't, we'll pay you by cheque. You should receive the payment within 10 working days of the date at the top of this letter.

You might need to pay tax on your compensation, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

If you receive any means-tested benefits (such as Universal Credit) this compensation may affect your eligibility to claim those benefits. FSCS cannot provide you with advice or guidance on means-tested benefits. If you're concerned about how this affects you, you should seek independent advice. For free impartial guidance on means-tested benefits, contact a Citizens Advice Bureau, visit the MoneyHelper website or visit www.gov.uk/browse/benefits.

Where you are in the claims process

- Making first contact
- Completing the application
- Investigating the claim
- Getting the decision
- Dealing with any issues



PHOENIX LIFE
Part of Phoenix Group

phoenixlife.co.uk

Email: complaints.support@phoenixlifesupport.co.uk

Complaints: +44 (0)203 353 8979
From overseas: +44 (0) 1256 841414
Monday to Friday: 9:00 am - 5:00 pm

Phoenix Life
PO Box 7019
Basingstoke RG24 4LY

Our Ref: [redacted]

4 December 2024

Dear [redacted]

Plan Number: [redacted]

Putting things right

When something goes wrong, we want to put it right and stop it from happening again, so thank you for taking the time to get in touch and for returning the form accepting our offer to put things right for you.

The agreed amount of £12,324.34 has been paid into the account you requested. This may take up to five working days to appear in your account

This is to put things right after you told us you had concerns about your plan. Because you have accepted our offer, we will not make any more payments to you.

We are here to help

If you have any questions or need more information, please get in touch. You will find my contact details at the top of this letter.

If you would like this information in large print, braille or audio please call 0345 072 0223. If calling from outside the UK please call +44 (0)1256 841414.

Yours sincerely

Elizabeth Bacon
Complaints Support

CC: Copy to Greg Vaughan Financial Services

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COPY

Clerical Medical
PO Box 24165
69 Morrison Street
Edinburgh
EH3 1HD

Telephone: 0800 096 4309
Extension number: 1587153

17 January 2025

Our reference:
Policy number:
Greg Vaughan Financial Services reference:

Your payment has been made

Dear

Thank you to Greg Vaughan for contacting us to confirm you would like to accept a cash lump sum.

We have paid you £15,210.77

We've paid £15,104.25 as shown on the Calculation Summary enclosed in our previous letter dated 16 December 2024.

We've also added an amount of £106.52 to your payment. This is to allow for the loss of investment growth from the valuation date of 1 October 2024, to the date the payment should reach your bank account. We've assumed this to be 31 January 2025.

For your information, the total amount of £15,210.77 made to your bank account ending will appear as more than one payment, with your complaint number in the reference.

If you have any questions, you can call me on 0800 096 4309, using my PIN 1587153. My working hours are 8am to 5pm Monday, Wednesday and Thursday and 8am to 6pm on Friday. If it's easier to call outside these hours, our office is open from 8am to 6pm Monday to Friday, when someone else can help you.

Yours sincerely

Cathy Eagle
Complaint Manager, Customer Services

Lloyds Bank plc. Registered Office: 25 Gresham Street, London EC2V 7HN. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. We are members of the Financial Services Compensation Scheme and the Financial Ombudsman Service. Telephone calls may be monitored or recorded.

Standard Life
Part of Phoenix Group

Contact us

0131 246 4921
Call charges will vary. You can find our most up to date opening times online.
Have your plan number ready.

slcomplaints@standardlife.com

Standard Life
Customer Relations
Edinburgh
EH1 2DH

Mr G Vaughan
Greg Vaughan Financial Services
127 Imperial Court
Exchange Street East
Liverpool
L2 3AB

Plan holder	[redacted]
Plan number	[redacted]
Our reference	[redacted]

10 January 2025

Settlement Confirmation

Dear Mr Vaughan,

We have received your Acceptance Form in relation to your complaint about the sale of [redacted] Freestanding Additional Voluntary Contribution (FSAVC).

I've made a payment of £13,620.08 to [redacted] bank account ending [redacted]. This payment is in full and final settlement of your complaint. This payment is broken down as follows:

Financial loss + loss in charges on 1 January 2025	£13, 099.41
Net Interest added (8% per annum simple) from 1 January 2025 to 10 January 2025)	£20.67
Trouble & Upset	£500.00
Total payable	£13,620.08

I've attached a Tax Deduction Certificate fo[redacted] in respect of the tax deducted from the gross interest amount payable.

Questions?
If you've any questions, please call me and I'll do all I can to help you.

Yours sincerely
S McFadden

Stephen McFadden
Complaint Consultant
Customer Relations

30 September, 2024

[redacted]

Dear [redacted]

Policy Number(s) [redacted]

Thank you for returning your signed acceptance form and agreeing to our offer.

We will pay £18,305.94 into your bank account. If you do not receive the payment within the next 7 days, please let us know.

If you have any questions about this, please call us on 01952 522895.

Yours sincerely,

Complaints Department

AP00002079/0622

Sun Life Financial of Canada
PO Box 7019
Basingstoke
RG24 4LY

☎ **Complaints**
Open Mon-Fri 9.00am to 5.00pm
Tel: +44 (0)203 353 8979
Tel: +44 (0)1256 841414
Complaints.support@uksloc.co.uk

[redacted]

Our Ref: [redacted]

9 July 2024

Dear [redacted]

Plan Number: [redacted]

Putting things right

When something goes wrong, we want to put it right and stop it from happening again, so thank you for taking the time to get in touch and for returning the form accepting our offer to put things right for you.

I have enclosed a cheque for £16,259.76.

This is to put things right after you told us you had concerns about your plan. Because you have accepted our offer, we will not make any more payments to you.

We are here to help

If you have any questions or need more information, please get in touch. You will find my contact details at the top of this letter.

Yours sincerely

Steven Parker
Complaints Support

Enc: Cheque for £16,259.76

CC: Copy to Greg Vaughan Financial Services

Sun Life Assurance Company of Canada (U.K.) Limited, incorporated in England and Wales, registered number 959082, registered office at Matrix House, Basing View, Basingstoke, Hampshire, RG21 4DZ, trades under the name of Sun Life Financial of Canada and is authorised by the

Our Ref: MMX12109423

AZPAYA

ACCEPTANCE OF OFFER

IDVA & Sig. - Ok

Wealth Complaints
PO Box 6176
Coventry
CV3 9HN

Payment Ref: [redacted]

I accept the gross offer of **£23,450.82** in full and final settlement of the complaint against HSBC UK Bank plc (or any of its subsidiaries) in respect of my **FSAVC Plan** [redacted]

I understand that **£3,517.63** will be paid to HMRC on my behalf and **£19,933.19** will be paid to my account stated below.

Please note that payments will be made direct to the bank or building society account detailed below and cannot be made to third parties.

Please credit my Current Account as follows:

Bank/Building Society:	[redacted]
Sort Code:	[redacted]
Current Account Number:	[redacted]
Account in the name of:	[redacted]
Bank/Building Society account holding address:	[redacted]

In the event of any payment discrepancies, it is essential that you provide a contact number to ensure a prompt resolution.

Tel: [redacted]

Signed [redacted] dated 22-5-24

ACCEPTANCE FORM

YOUR ACCEPTANCE

☑ I refer to Aviva's offer dated 14 May 2024 and confirm I accept the payment of a lump sum (£9,087.46 plus growth to date of payment) into my chosen account.

I acknowledge and accept the offer is made in full and final settlement of all claims I have relating to the advice I was given to take out my FSAVC policy.

Reference [redacted]

Policy [redacted]

YOUR PAYEE DETAILS – MUST BE COMPLETED TO ENSURE PAYMENT

Your Bank Account

Account Holder Name: [redacted]

Bank/Building Society Name: [redacted]

Sort Code: [redacted] Account No: [redacted]

Building Society Roll No: (If applicable)

If the above account is unknown to Aviva we may need to carry out a routine electronic third-party check (the quickest way to verify your identity).

If you don't want us to carry out this check please enclose an original (or certified copy) of a statement for this account dated within the last six months.

If we don't receive a bank statement the electronic check will be carried out.

NON-ACCEPTANCE

☐ I don't accept the offer.
(Please give your reasons below or on a separate sheet of paper.)

Signed: [redacted]
Name:

Date: 17.05.24.

Members of the Association of British Insurers

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Aviva UK Life
Sales Complaints
PO Box 904
Sheffield, S11 8LF

Aviva: Confidential

FSCS reference [redacted]
Please quote our reference when contacting us
Representative reference [redacted]

[redacted]

Financial Services Compensation Scheme

Call
0800 678 1100 (free)
Email
claims@fscs.org.uk
Write
PO Box 300
Mitcheldean
GL17 1DY
Visit
www.fscs.org.uk

14 May 2024

Dear [redacted]

We will pay you compensation

Where you are in the claims process

- Making first contact
- Completing the application
- Investigating the claim
- Getting the decision
- Dealing with any issues

- You have a valid claim against Burns-Anderson Limited (formerly The Burns Anderson Independent Network Plc) (the Firm) regarding your Free-Standing Additional Voluntary Contribution (FSAVC) fund.
- This means we can pay you **£50,000** in compensation.

How much you'll receive

We have calculated your total loss as **£53,993.90**. Our compensation limits don't allow us to pay more than £50,000 per customer, per firm.

Amount we are able to pay under our rules	£50,000

How and when you'll receive your payment

We'll check the bank account information you gave us. If everything's in order, we'll pay the compensation directly into the account. If we can't, we'll pay you by cheque. You should receive the payment within 10 working days of the date at the top of this letter.

You might need to pay tax on your compensation, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

If you receive any means-tested benefits (such as Universal Credit) this compensation may affect your eligibility to claim those benefits. FSCS cannot provide you with advice or guidance on means-tested benefits. If you're concerned about how this affects you, you should seek independent advice. For free impartial guidance on means-tested benefits, contact a Citizens Advice Bureau, visit the MoneyHelper website or visit www.gov.uk/browse/benefits.

Tel: 0800 756 8061
Lines open: Monday to Friday, 9am to 5pm
For Textphone: Dial 18001 first
We may record and/or monitor calls for training and audit purposes

Our Ref: LVL=[redacted]

5 April 2024

Dear [redacted]

Re: Teachers Assurance Free Standing AVC Policy No. [redacted]

Thank you for returning the signed Acceptance Form in response to our offer of redress as set out in our letter dated 20 March 2024.

A payment for £15,007.16 has been forwarded to you separately in full and final settlement of your complaint. Please allow 5 to 7 working days for the payment to arrive.

I am now closing your complaint file but if you have any questions, you can email me on julie.hewlett@lv.com or call 0800 756 8061.

Yours sincerely

Julie Hewlett
LV=

Find out how we use your personal information, and what rights you have by visiting www.LV.com/dataprotectionlife.

Please let us know if you'd like us to send you a copy or have any questions. This includes who we are, how long we hold your information, what we do with it and who we share it with.

Calls may be recorded for training and monitoring purposes.

Acceptance Form

Reference
[redacted]
Policy
[redacted]

☑ I refer to Aviva's offer dated 26 March 2024 and confirm I accept the payment in the method indicated below. I acknowledge and accept that the offer is made in full and final settlement of all claims I have relating to the advice received to take out the policy numbered opposite.

I would like £17,582.34 (plus growth up to the payment date) to be paid to me as a lump sum.

Yes / ~~No~~

Please complete your chosen method of payment below and sign/date.

Your Bank Account

Account Holder Name: [redacted]

Bank/Building Society Name: [redacted]

Sort Code: [redacted] Account No: [redacted]

Building Society Roll No:

(If applicable)

If the above account is unknown to Aviva we may need to carry out a routine electronic third-party check (the quickest way to verify your identity).

If you don't want us to carry out this check please enclose an original (or certified copy) of a statement for this account dated within the last six months.

If we don't receive a bank statement the electronic check will be carried out.

Signed: [redacted] Date: 03/04/2026

Name: Mr Peter Lloyd

Members of the Association of British Insurers

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Aviva UK Life
Sales Complaints
PO Box 904
Sheffield, S11 8LF

Aviva: Confidential

ACCEPTANCE FORM

YOUR ACCEPTANCE

☑ I refer to Aviva's offer dated 12 March 2024 and confirm I accept the payment of a lump sum (£8,571.29 plus growth to date of payment) into my chosen account.

I acknowledge and accept the offer is made in full and final settlement of all claims I have relating to the advice I was given to take out my FSAVC policy.

Reference
[redacted]

Policy
[redacted]

YOUR PAYEE DETAILS – MUST BE COMPLETED TO ENSURE PAYMENT

Your Bank Account

Account Holder Name: [redacted]

Bank/Building Society Name: [redacted]

Sort Code: [redacted] Account No: [redacted]

Building Society Roll No:
(If applicable)

If the above account is unknown to Aviva we may need to carry out a routine electronic third-party check (the quickest way to verify your identity).

If you don't want us to carry out this check please enclose an original (or certified copy) of a statement for this account dated within the last six months.

If we don't receive a bank statement the electronic check will be carried out.

NON-ACCEPTANCE

☐ I don't accept the offer.
(Please give your reasons below or on a separate sheet of paper.)

Signed:
Name: [redacted]

Date: 14/3/24

ACCEPTANCE FORM

YOUR ACCEPTANCE

☑ I refer to Aviva's offer dated 12 March 2024 and confirm I accept the payment of a lump sum (£8,093.75 plus growth to date of payment) into my chosen account.

I acknowledge and accept the offer is made in full and final settlement of all claims I have relating to the advice I was given to take out my FSAVC policy.

Reference [redacted]

Policy [redacted]

YOUR PAYEE DETAILS – MUST BE COMPLETED TO ENSURE PAYMENT

Your Bank Account

Account Holder Name: [redacted]

Bank/Building Society Name: [redacted]

Sort Code: [redacted] Account No: [redacted]

Building Society Roll No:
(If applicable)

If the above account is unknown to Aviva we may need to carry out a routine electronic third-party check (the quickest way to verify your identity).

If you don't want us to carry out this check please enclose an original (or certified copy) of a statement for this account dated within the last six months.

If we don't receive a bank statement the electronic check will be carried out.

NON-ACCEPTANCE

☐ I don't accept the offer.
(Please give your reasons below or on a separate sheet of paper.)

Signed: [redacted] Date: 14/3/24

Name: [redacted]

Members of the Association of British Insurers

Aviva Life & Pensions UK Limited. Registered in England No. 3253947. Registered Office: Aviva, Wellington Row, York, YO90 1WR. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm Reference Number 185896.

Aviva UK Life
Sales Complaints
PO Box 904
Sheffield, S11 8LF

Aviva: Confidential

Acceptance Form

Reference
[redacted]
Policy
[redacted]

☑ I refer to Aviva's offer of £7200.33 dated 25/01/2024 and confirm I accept the payment in the method indicated below. I acknowledge and accept that the offer is made in full and final settlement of all claims I have relating to the advice received to take out the policy numbered opposite.

Please complete your chosen method of payment on the following page of the Acceptance Form and sign/date.

Your Bank Account

Account Holder Name: [redacted]

Bank/Building Society Name: [redacted]

Sort Code: [redacted] Account No: [redacted]

Building Society Roll No:

(If applicable)

If the above account is unknown to Aviva we may need to carry out a routine electronic third-party check (the quickest way to verify your identity).

If you don't want us to carry out this check please enclose an original (or certified copy) of a statement for this account dated within the last six months.

If we don't receive a bank statement the electronic check will be carried out.

☐ I don't accept the offer.
(Please give your reasons below or on a separate sheet of paper)

Signed: [redacted] Date: 1/3/24

Name: [redacted]

1001

Members of the Association of British Insurers

Aviva Life & Pensions UK Limited. Registered in England No. 3253947. Registered Office: Aviva, Wellington Row, York, YO90 1WR. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm Reference Number 185896.

Aviva UK Life
Sales Complaints
PO Box 904
Sheffield, S11 8LF

Aviva: Confidential

AP00002079/0622

Sun Life Financial of Canada
PO Box 7019
Basingstoke
RG24 4LY

☎ **Complaints**
Open Mon-Fri 9.00am to 5.00pm
Tel: +44 (0)203 353 8979
Tel: +44 (0)1256 841414
Complaints.support@uksloc.co.uk

Our Ref: [redacted]

[redacted]

20 February 2024

Dear [redacted]

Plan Number: [redacted]

Putting things right

Thank you for returning the form accepting our offer to put things right for you.

The agreed amount of £16,332.89 has been paid into the account you requested. This may take up to five working days to appear in your account

This is to put things right after you told us you had concerns about your plan. Because you have accepted our offer, we will not make any more payments to you.

We are here to help

If you have any questions or need more information, please get in touch. You will find my contact details at the top of this letter.

If you would like a large print, Braille or audio CD version of this letter, please call 0345 072 0223.

Yours sincerely

Joshua Boucher
Complaints Support

CC: Copy to Mr Greg Vaughan

Sun Life Assurance Company of Canada (U.K.) Limited, incorporated in England and Wales, registered number 959082, registered office at Matrix House, Basing View, Basingstoke, Hampshire, RG21 4DZ, trades under the name of Sun Life Financial of Canada and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Sun Life Financial of Canada

AP00002079/0622

Sun Life Financial of Canada
PO Box 7019
Basingstoke
RG24 4LY

☎ **Complaints**
Open Mon-Fri 9.00am to 5.00pm
Tel: +44 (0)203 353 8979
Tel: +44 (0)1256 841414
Complaints.support@uksloc.co.uk

Our Ref: [redacted]

[redacted]

24 January 2024

Dear [redacted]

Plan Number: [redacted]

Putting things right

Thank you for returning the form accepting our offer to put things right for you.

The agreed amount of £55,495.06 has been paid into the account you requested. This may take up to five working days to appear in your account

This is to put things right after you told us you had concerns about your plan. Because you have accepted our offer, we will not make any more payments to you.

We are here to help

If you have any questions or need more information, please get in touch. You will find my contact details at the top of this letter.

If you would like a large print, Braille or audio CD version of this letter, please call 0345 072 0223.

Yours sincerely

Nigel Parker
Complaints Support

CC: Greg Vaughan Financial Services

Sun Life Assurance Company of Canada (U.K.) Limited, incorporated in England and Wales, registered number 959082, registered office at Matrix House, Basing View, Basingstoke, Hampshire, RG21 4DZ, trades under the name of Sun Life Financial of Canada and is authorised by the

AP00002079/0622

Sun Life Financial of Canada
PO Box 7019
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RG24 4LY

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Our Ref: [redacted]

[redacted]

18 January 2024

Dear [redacted]

Plan Number: [redacted]

Putting things right

Thank you for returning the form accepting our offer to put things right for you.

The agreed amount of £26,126.97 has been paid into the account you requested. This may take up to five working days to appear in your account

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Yours sincerely

Nigel Parker
Complaints Support

CC: Greg Vaughan Financial Services

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Sun Life Financial of Canada

AP00002079/0622

Sun Life Financial of Canada
PO Box 7019
Basingstoke
RG24 4LY

Tel: +44 (0)203 353 8946
Tel: +44 (0)1256 841414
Complaints.support@uksloc.co.uk

Our Ref: [redacted]

[redacted]

15 December 2023

Dear [redacted]

Plan Number: [redacted]

Putting things right

Thank you for returning the form accepting our offer to put things right for you.

As you chose the Redress Plan option I have paid £19,895.36 into a new plan for you and I enclose a plan schedule showing where the money is invested and a recent valuation statement.

The table below provides a breakdown of the redress awarded for your records.

Pension Redress Awarded	**Amount**
Gross Primary Compensation Sum (A)	£18,736.76
Secondary Compensation Sum (B)	£1,000
Net interest on A+B, less tax at basic rate, covering the period of 1 July 2023 (valuation date) to 15 December 2023	£158.60
Total Redress Payable	**£19,895.36**

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If you have any questions or need more information, please get in touch. You will find my contact details at the top of this letter.

Yours sincerely

Mrs Petula Martin
Complaint Handler

Encs: Plan Schedule
Valuation Statement

CC: Copy to Greg Vaughan

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