DO NOT SCAN

ACCEPTANCE FORM

Reference [redacted]

YOUR ACCEPTANCE

☐ I refer to Aviva's offer dated 17 June 2020 and confirm that I accept the ex-gratia payment of £26,267.59 in full and final settlement of all claims I have relating to the advice received in respect of the policy numbered opposite

YOUR PAYEE DETAILS – MUST BE COMPLETED TO ENSURE PAYMENT

☐ I wish payment to be made to the account specified below.

If payment is going to a bank account which is unknown to Aviva, we may need to carry out a routine electronic third party check, which is the quickest way to check your identity. **If you don't want this check to be carried out please provide an original or certified copy of a bank statement for this account dated within the last six months.** If we do not receive a bank statement the electronic check will be carried out.

Your Bank Account Details

Account Holder Name(s):

Bank/Building Society:

Sort Code: | | | | | | | Account No: | | | | | | | | |

NON ACCEPTANCE

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

Signed: Date:

Name: [redacted]

Members of the Association of British Insurers
Aviva Life Services UK Limited. Registered in England No 2403746. 2 Rougier Street, York, YO90 1UU.
Aviva Life Services UK Limited is authorised and regulated by the Financial Conduct Authority.

Aviva UK Life
Customer Relations (Sales Complaints)
Aviva UK Life, Wellington Row 3
York, YO90 1UU

Aviva: Confidential

Tel: 0800 756 8074
For Text Phone: dial 18001 first

[redacted]

Our Ref: LVL=[redacted]

12 May 2020

Dear Miss Lang

Your Free Standing Additional Voluntary Contribution Plan
Policy Number [redacted]

Further to previous correspondence we've now completed our investigation into your complaint about the sale of your Teachers Assurance Free Standing Additional Voluntary Contribution Plan (FSAVC).

We previously concluded that your complaint should be upheld and this letter sets out the offer we now wish to make. The offer is in accordance with the principles and assumptions laid down by the Financial Services Authority (FSA) (now the Financial Conduct Authority), during the industry wide review of FSAVC plan sales and as recognised by the Financial Ombudsman Service.

We offer to compensate you by:

- A lump sum, payable to you, of **£27,004.34** as at the calculation date of 1 April 2020 plus interest to the date of settlement.

Our offer is made on the assumption that the only FSAVC policy you held was with Teachers Assurance/LV=. If this is not the case please let us know immediately as this offer may not be appropriate to your circumstances.

Our calculations have been based on various assumptions as to your own personal details and the benefits offered by the Added Years arrangement in the Teachers Pension Scheme. These assumptions are listed in the attached Appendix 1, which you should read. If you believe that any of these assumptions are inappropriate or incorrect please let me know as soon as possible.

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FSCS reference [redacted]

Please quote our reference when contacting us

[redacted]

Call
0800 678 1100 (free)

Email
www.fscs.org.uk/contact-us

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
fscs.org.uk

30 May 2020

Dear [redacted]

We will pay you compensation

- We agree that you have a valid claim against [redacted] (the Firm) regarding your Free-Standing Additional Voluntary Contribution (FSAVC) policy.
- This means we can pay you **£37,934.41** in compensation.

How we worked out your payment

We have calculated your total loss as **£38,816.01**. Our compensation limits don't allow us to pay more than £48,000 per customer, per firm.

For investment claims against firms that were declared in default before 1st January 2010, the limit is £48,000 (100% of the first £30,000 and 90% of the next £20,000), per investor, per firm.

Amount we are able to pay under our rules	£37,934.41

We'll send a cheque payable to [redacted], as you requested. You should receive the payment within 10 working days of the date at the top of this letter. You might need to pay some tax on it, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

Any questions?

If you have any questions or concerns about the decision or the payment, please contact us using the details at the top of this letter. We'll be happy to help.

Where you are in the claims process

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

Sun Life Financial of Canada

AP00002079/0920

Matrix House, Basing View,
Basingstoke, Hampshire.
RG21 4DZ

Tel: +44 (0)1256 849101
Tel: +44 (0)1256 841414
Fax: +44 (0)1256 849007
Ukcomplaints.support@sloc.co.uk

Our Ref: [redacted]

[redacted]

26 May 2020

Dear [redacted]

Plan Number: [redacted]

Putting things right

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

I have paid £9563.58 into a new plan for you and enclosed a plan schedule showing where the money is invested.

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

Andy Vaughan
Complaints Adjudicator

Enc: Plan Schedule

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.

WESLEYAN

we are all about you

Wesleyan
Colmore Circus, Birmingham B4 6AR
T 0345 351 2352 | F 0121 200 2971 | www.wesleyan.co.uk

Our reference: [redacted]

FAO: [redacted]

LETTER OF ACCEPTANCE

I accept the offer contained within the letter received from Wesleyan Assurance Society dated [redacted] and the payment of **£54,327.84** in full and final settlement of my complaint regarding the sale of the plan below.

N.B. Acceptance of this offer may result in you being unable to pursue your complaint via the Financial Ombudsman Service.

Plan Number: [redacted]

Endorsement

I accept the settlement offer contained in this letter including any assumptions made and as outlined above.

I understand that this offer is in full and final settlement of all my claims under the plan shown above for the advice given to me by Wesleyan Financial Services to take out the plan instead of paying Additional Voluntary Contributions to the NHS Pension Scheme.

Signed .....

Name .....
(PLEASE PRINT)

Date .....

For Wesleyan use only

Offer summary: ☐

R185 Form needed?

Requisition details

Payment type	Nominal Code	Cost Centre	Amount
			£
			£
			£

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WG-LETT-1-10/17

Acceptance Form (FORM B)

From: [redacted]
To: NatWest Bank

Ref: [redacted]

I wish to accept the offer set out in your letter dated 13 March 2020, of a payment to me by direct bank transfer of **£61,445.84**.

Igive my consent for this payment to be paid directly into my bank account. I enclose an original bank statement (paper or printed online statement) dated within the last six months to confirm the account details. I/We understand that if this is a joint account, the other account holder(s) will have access to the cash sum offered.

This is on the basis that such an offer is accepted in full and final settlement of all or any claims which I might have against the Royal Bank of Scotland, or any subsidiary companies, in respect of my [redacted] FSAVC number [redacted]

I am not (and have not been in the last 12 months) subject to any alternative financial arrangement, such as a bankruptcy, sequestration, individual voluntary arrangement (IVA) or trust deed.

IMPORTANT: I understand and agree that if my acceptance of offer is given on or after 13 June 2020 the sum detailed above will be subject to recalculation so could be more or less than **£61,445.84**.

Signed .....

[redacted]

Dated .....

Bank Account for payment

Sort code:	.....	Account number:	.....
Name of Bank:	.....		
Account holder name(s):	.....		

FSCS reference [redacted]

Please quote our reference when contacting us

Financial Services Compensation Scheme

[redacted]

Call
0800 678 1100 (free)
Email
www.fscs.org.uk/contact-us
Write
PO Box 300
Mitcheldean
GL17 1DY
Visit
fscs.org.uk

26 March 2020

Dear [redacted]

We will pay you compensation

- We agree that you have a valid claim against [redacted] (the Firm) regarding your Free Standing Additional Voluntary Contribution (FSAVC) policy.
- This means we can pay you **£48,000** 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 we worked out your payment

We have calculated your total loss as **£56,529.83**. Our compensation limits don't allow us to pay more than £48,000 per customer, per firm.

Our rules limit the amount we can pay. For investment claims against firms that were declared in default before 1st January 2010, the limit is £48,000 (100% of the first £30,000 and 90% of the next £20,000), per investor, per firm.

Amount we are able to pay under our rules	£48,000

We'll send a cheque payable to Dr Martin Wiselka, as you requested. You should receive the payment within 10 working days of the date at the top of this letter. You might need to pay some tax on it, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

Any questions?

If you have any questions or concerns about the decision or the payment, please contact us using the details at the top of this letter. We'll be happy to help.

FSCS reference [redacted]

Please quote our reference when contacting us

Financial Services Compensation Scheme

Call
0800 678 1100 (free)

Email
www.fscs.org.uk/contact-us

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
fscs.org.uk

Dr [redacted]
By email

19 February 2020

Dear [redacted]

We will pay you compensation

- We agree that you have a valid claim against [redacted] (the Firm) regarding your Free-Standing Additional Voluntary Contribution (FSAVC) policy.
- This means we can pay you **£48,000** in compensation.

How we worked out your payment

We have calculated your total loss as **£58,851.87**. Our compensation limits don't allow us to pay more than £48,000 per customer, per firm.

Our rules limit the amount we can pay. For investment claims against firms that were declared in default before 1st January 2010, the limit is £48,000 (100% of the first £30,000 and 90% of the next £20,000), per investor, per firm.

Amount we are able to pay under our rules	£48,000

We'll send a cheque payable to [redacted], as you requested.

You should receive the payment within 10 working days of the date at the top of this letter. You might need to pay some tax on it, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

Any questions?

If you have any questions or concerns about the decision or the payment, please contact us using the details at the top of this letter. We'll be happy to help.

Where you are in the claims process

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

WESLEYAN

we are all about you

Our reference: [redacted]

FAO: [redacted]

Wesleyan
Colmore Circus, Birmingham B4 6AR
T 0345 351 2352 | F 0121 200 2971 | www.wesleyan.co.uk

LETTER OF ACCEPTANCE

I accept the offer contained within the letter received from Wesleyan Assurance Society dated 25 November 2019 and the payment of **£20,425.98** in full and final settlement of my complaint.

N.B. Acceptance of this offer may result in you being unable to pursue your complaint via the Financial Ombudsman Service.

Endorsement

I accept the settlement offer contained in this letter including any assumptions made and as outlined above.

I understand that this offer is in full and final settlement of all my claims under the plan shown below for the advice given to me by Wesleyan Financial Services to take out the Plan instead of paying Additional Voluntary Contributions to the NHS Pension Scheme.

Signed ----------

Name ----------
(PLEASE PRINT)

Date ----------

For Wesleyan use only

Offer summary: ☐

R185 Form needed?

Requisition details

Payment type	Nominal Code	Cost Centre	Amount
			£
			£
			£

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CAPITA

[redacted]

Our Reference: [redacted]

Contact: [redacted]

7 August 2019

Dear [redacted]

Review of Personal Pensions – Barclays Additional Wealth Plan (FSAVC) [redacted]

I refer to your complaint about the advice received from ReAssure (formerly Barclays Life) concerning your FSAVC pension arrangements.

We have investigated your complaint regarding the advice you received to take out a FSAVC plan rather than join the Teachers' Pension Scheme's in-house AVC arrangement. We have established that the potential benefits from your FSAVC plan are less than the value of the benefits that you would have received if you had become a member of the in-house AVC arrangements.

I am pleased to inform you that we have completed a loss assessment on behalf of ReAssure, in line with the guidance laid down by the Financial Conduct Authority (FCA). Under these guidelines, your FSAVC pension arrangements are less beneficial than the in-house AVC Scheme benefits would have been and this letter sets out how it is proposed to put this right.

If you wish to accept this offer, please sign and return the enclosed acceptance form using the envelope provided. A copy of the acceptance form is enclosed for you to retain for your own records. Upon receiving your acceptance, we shall forward this to ReAssure to action the offer of redress as quickly as possible. You should be aware that by accepting this offer you will not be able to bring any further claim against ReAssure concerning this matter.

The regulator's guidelines say that total reinstatement of benefits in the scheme is usually the most appropriate form of redress. The trustees of the Teachers' Pension Scheme will not permit reinstatement of your benefits within the scheme so our offer is as follows:-

- To pay a lump sum of £35,224.42 as at 1 April 2019 [redacted]

Remediation services
Knights Court, Solihull Parkway, Birmingham Business Park, Birmingham B37 7YB
Tel 0121 717 3500 www.capita.com/remediation

Capita Remediation Services is a trading name of Capita Retail Financial Services Limited.
Capita Retail Financial Services Limited is registered in England & Wales No: 05296886.
Registered Office: 30 Berners Street, London, W1T 3LR.
Part of Capita plc. www.capita.com

WESLEYAN
we are all about you

Wesleyan
Colmore Circus, Birmingham B4 6AR
T 0345 351 2352 | F 0121 200 2971 | www.wesleyan.co.uk

Our reference: [redacted]

LETTER OF ACCEPTANCE

I accept the offer contained within the letter received from Wesleyan Assurance Society dated 30 September 2019 and the payment of **£11,410.53**, in full and final settlement of my complaint about [redacted]

N.B. Acceptance of this offer may result in you being unable to pursue your complaint via the Financial Ombudsman Service.

Our offer is outlined as follows. All the figures are correct as at 1 July 2019

A Payment of the value of £11,410.53 as at 1 July 2019

Endorsement

1. I accept the settlement offer contained in this letter including any assumptions made and as outlined above.

2. I understand that this offer is in full and final settlement of all my claims under the plans shown below for the advice given to me by Wesleyan Assurance Society to take out the plan instead of paying Additional Voluntary Contributions to the NHS Pension Scheme.

Signed ----------

Name ----------
(PLEASE PRINT)

Date ----------

For Wesleyan use only

Offer summary:

R185 Form needed?

Requisition details

Payment type	Nominal Code	Cost Centre	Amount
			£
			£
			£

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WG-LETT-1-10/17

Acceptance Form

Client: [redacted] **Policy Number:** [redacted]

Our Reference: [redacted]

I confirm that I have read and understood the contents of your letter dated 26 September 2019 and the attached schedule of Key Facts and Assumptions.

1. I accept the offer to set up an FSAVC review bond for £40,074.34 as at 1 July 2019 with Canada Life on the terms set out therein in full and final settlement of my complaint.

Signed: ..... Date:.....

[redacted]

OR

2. I do not accept the outcome of the investigation in full and final settlement of my complaint for the reasons given below (please continue overleaf should you require more space).

_____

_____

_____

_____

_____

Signed: ..... Date:.....

[redacted]

Instructions

- Please sign this 'Acceptance Form'
- Please then return it to us in the enclosed prepaid envelope

Sun Life Financial of Canada

AP00002079/0920

Matrix House, Basing View,
Basingstoke, Hampshire.
RG21 4DZ

Tel: +44 (0)1256 656464
Tel: +44 (0)1256 841414
Fax: +44 (0)1256 849007
Ukcomplaints.support@sloc.co.uk

Our Ref: [redacted]

[redacted]

25 October 2019

Dear [redacted]

Plan Number: [redacted]

Putting things right

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

I have enclosed a cheque for £82,467.36.

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

Nigel Parker
Complaints Support

Enc: Cheque for £82,467.36

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 Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

FSCS reference [redacted]

Please quote our reference when contacting us

Call
0800 678 1100 (free)

Email
www.fscs.org.uk/contact-us

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
fscs.org.uk

Mr [redacted]
By email

30 October 2019

Dear Mr Miles

We will pay you compensation

- We agree that you have a valid claim against [redacted] (the Firm) regarding your FSAVC.
- This means we can pay you **£48,000** 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 we worked out your payment

We have calculated your total loss as **£77,910.41**. For investment claims against firms that were declared in default before 1 January 2010, the limit is £48,000 (100% of the first £30,000 and 90% of the next £20,000). For claims against firms that were declared in default after 1 January 2010 the limit increased to £50,000, per investor, per firm. The Firm was declared in default before 1 January 2010. Our compensation limits don't allow us to pay more than £48,000 per customer, per firm.

Amount we are able to pay under our rules	£48,000
Total amount we are paying	**£48,000**

We'll send a cheque payable to [redacted] as you requested.

You should receive the payment within 10 working days of the date at the top of this letter. You might need to pay some tax on it, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

Any questions?

If you have any questions or concerns about the decision or the payment, please contact us using the details at the top of this letter. We'll be happy to help.

FSCS reference [redacted]

Please quote our reference when contacting us

Financial Services Compensation Scheme

[redacted]

Call
0800 678 1100 (free)

Email
www.fscs.org.uk/contact-us

Write
PO Box 300
Mitcheldean
GL17 1DY

Visit
fscs.org.uk

30 September 2019

Dear [redacted]

We will pay you compensation

- We agree that you have a valid claim against [redacted] (the Firm) regarding your free-standing additional voluntary contributions (FSAVC).
- This means we can pay you **£16,710.72** 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 we worked out your payment

We have calculated your total loss as **£16,710.72**.

Amount we are able to pay under our rules	**£16,710.72**
Total amount we are paying	**£16,710.72**

We'll send a cheque payable to [redacted] as you requested.

You should receive the payment within 10 working days of the date at the top of this letter. You might need to pay some tax on it, depending on your income and circumstances. You can check this by talking to HMRC or a tax adviser.

Any questions?

If you have any questions or concerns about the decision or the payment, please contact us using the details at the top of this letter. We'll be happy to help.

Yours sincerely

Jimmy Barber
Chief Operating Officer

Tel: 0800 756 8074
For Text Phone: dial 18001 first

Our Ref: LVL=[redacted]

30 August 2019

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 as set out in our letter dated 19 August 2019.

A cheque for £25,923.15 has been forwarded to you separately in full and final settlement of your complaint. Please allow 7 to 10 working days for the cheque to arrive.

I enclose a form showing the tax deducted from the interest paid. HMRC may require this form.

I am now closing your complaint file but if you have any questions you can email me on nigel.morgan@LV.com or call 0800 756 8074.

Yours sincerely

Nigel Morgan
Customer Relations
LV=

cc: Greg Vaughan Financial Services

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Tel: 0800 756 8074
For Text Phone: dial 18001 first

[redacted]

Our Ref: LVL[redacted]

11 July 2019

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 as set out in our letter dated 25 June 2019.

A cheque for £29,479.97 has been forwarded to you separately in full and final settlement of your complaint. Please allow 7 to 10 working days for the cheque to arrive.

I enclose a form showing the tax deducted from the interest paid. HMRC may require this form.

I am now closing your complaint file but if you have any questions you can email me on nigel.morgan@LV.com or call 0800 756 8074.

Yours sincerely

Nigel Morgan
Customer Relations
LV=

cc: Greg Vaughan Financial Services

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

Liverpool Victoria Friendly Society Limited, County Gates, Bournemouth, BH1 2NF.

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DO NOT SCAN

ACCEPTANCE FORM

YOUR ACCEPTANCE

☐ I refer to Aviva's offer dated 19 July 2019 and confirm I accept the payment of £21,329.82 made in full and final settlement of all claims I have relating to the advice received in respect of the policy numbered opposite.

Reference [redacted]
Policy [redacted]

YOUR PAYEE DETAILS – MUST BE COMPLETED TO ENSURE PAYMENT

Your Bank Account

Account Holder Name:

Bank/Building Society Name:

Sort Code: | | | | | | | Account No: | | | | | | | | |

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:

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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