

Direct Redress Limited

Booths Park No.5, Chelford Road, Knutsford, WA16 8GS

T: 0800 368 8512 | E: adviceclaims@directredress.com

Website: www.directredress.com



Dear Sirs,

[DATE]

Subject Access Request

Account Holder Name(s): [YOUR NAME]
Previous Name: [YOUR PREVIOUS NAME]
Current Address: [YOUR ADDRESS]
Previous Address: [YOUR PREVIOUS ADDRESS]
Date of Birth: [YOUR DOB]
NI Number: [YOUR NI]
Name of Advice Firm: [NAME OF ADVISER]

I understand that you currently hold details of my personal and financial information within your internal record systems.

Please supply me with a complete list of all the documentation concerning my history with your organisation relating to any financial products such as (but not limited to) Investments, Pensions or Protection Policies.

Please provide copies of:

1. Full advice file.
2. Fact Find.
3. Terms of business letter.
4. Suitability Letter.
5. All correspondence to and from the client (including any ongoing advice reviews).
6. Full breakdown of fees received for each policy.

Please confirm:

1. Plan number(s).
2. The date of inception.
3. Any information or correspondence in relation to complaints made about any product.
4. Full details of the original selling agent.
5. All charges associate with the product including, initial charges, cost of advice, early redemption fees, annual management charges for each fund and portfolio management charges.

**I AUTHORISE YOU TO SEND THIS INFORMATION DIGITALLY TO: ADVICECLAIMS-DSAR@DIRECTREDRESS.COM
OR ALTERNATIVELY YOU CAN POST THIS TO: DIRECT REDRESS LIMITED, BOOTH'S PARK 5, CHELFORD ROAD,
KNUTSFORD, WA16 8GS.**

I authorise for Direct Redress to amend any dates or corrections for the authority to the time of submission of my case.

I look forward to hearing from you within the timescale as outlined under Article 15 of the GDPR guidelines.

Yours sincerely,

Name: [YOUR NAME]
Signed: [YOUR SIGNATURE]

Date: [DATE]

Company registered in England No.07489855.

Direct Redress Limited is authorised and regulated by the Financial Conduct Authority in respect of regulated claims management activities.
Our registration no.838662 is recorded on the FCA register www.register.fca.org.uk.