

**Strictly Private & Confidential**

Mr Example  
Address line 1  
Address line 2  
Address line 3  
Address line 4  
Postcode

April 2018

Our Ref: Valuation/99999999

Dear Mr Example

**Wrap Investment Portfolio**

**Member Name:** Mr Example  
**Member Number:** 99999  
Date of Valuation: **12th April 2018**

Please find enclosed the statement in respect of your **Investment Portfolio**. This is intended to allow you to review your Investment Portfolio and ensure that your retirement saving provision is adequate.

Please refer to the enclosed Valuation Guidance Notes for details of how your statement has been prepared.

At the back of the statement there is a detachable 'Updating Your Personal Details' form containing the personal data that we hold about you. If your details have changed, please complete and return the amended form to us.

If you have any questions regarding the information contained within the enclosed documents please contact your Financial Adviser or your Account Executive on 03455 212 414.

Yours sincerely

*Andy Lockwood*

**Department Manager**

**James Hay Partnership**, Dunn's House, St Paul's Road, Salisbury, SP2 7BF

Encs.