

## Independent Financial Advisers Financial Life Planners

Interface Financial Planning Ltd.

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Miss S Tester 10 Dean Street London WS1 1XX

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Dear Sharon

## Re: Arrangement of a Funeral Plan for your father Mr Tommy Tester

You will recall that we were in touch with you last month because your father had asked us to arrange a funeral plan on his behalf and he wanted to appoint you as his nominated representative.

He has now arranged a funeral plan with XYZ Funeral Plans whose address and contact details are on the enclosed documents. The documents also show you that his plan number is ABC 123456, and his nominated funeral director is AJP of 1 High Street Matcham.

Please keep the enclosed documentation in a safe place. Hopefully they will not be required for many years to come, however, at the time of need all you need to do is phone *XYZ funeral plans* on the following number *0800 123 987* where they operate a 24-hour service. In addition, if at any time you have any queries, please get in touch with us and we will be glad to help.

Please note that Funeral Plans are now regulated by The Financial Conduct Authority which provides you and your father with additional protection.

Yours sincerely

Mr Alan Moran

## **Enclosed:**

- 1. Plan Certificate
- 2. Instructions for Next of Kin
- 3. Funeral Wishes form completed by Mr Tommy Tester
- 4. Plan details and product features
- 5. Product details including definitions, what the plan covers, what the plan does not cover, general procedures, & cancellation