

Initial Enquiry Form



Independent Pension Specialists
Your pension | your life | our independent advice

To help us deal with your enquiry efficiently, please complete the following sections.

If you have any questions about this form, please call us on 01622 238 000.

I wish to find out about:

Please Tick

- 1. Releasing a cash lump sum from my pension(s) before normal retirement age (min. age 55)
- 2. Advice on putting my pension(s) into payment (min. age 55) e.g. Annuity/Drawdown
- 3. Retirement Planning Advice
- 4. Having my existing pension schemes reviewed
- 5. Transferring/Consolidating my existing pensions into a new scheme
- 6. Dealing with a Pension Sharing Order following a divorce

My Objective(s):

Please write down your main objective(s) and ideally what you want to achieve.

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Personal Details

Title: Miss/Mrs/Ms/Mr Forename: Surname

House Number: Postcode: Date of Birth:

National Insurance Number: Email:

Daytime Telephone Number: Mobile:

Marital Status: Single Married Separated Divorced Partner Civil Partnership Widowed

If married or with a partner, their Name: their Date of Birth:

Number of Pension Schemes:

How many pension schemes do you have including your current employer's pension?

Please circle 1 / 2 / 3 / 4 / 5 / 6 / 7 Other

Please provide details of ALL your pension companies overleaf.

Data Protection Act

Your personal details are dealt with in the strictest confidence and we will not pass them onto other companies without your permission.

It would also be very helpful if you could enclose copies of any recent information from your pension scheme(s) as this will provide us with useful additional background data and may mean that we can begin work quicker on your behalf.

PENSION SCHEME 1

Is this an: old Company Pension a Personal Pension or your current employers pension

Name of Pension Scheme/Company:

Managed by (if different): Fund Value (if known): £.....

Address:

..... Postcode:

Telephone Number(s):

If Company Pension: Date Employment Started: Date left company:

If Personal Pension, please provide Policy Number(s):

PENSION SCHEME 2

Is this an: old Company Pension a Personal Pension or your current employers pension

Name of Pension Scheme/Company:

Managed by (if different): Fund Value (if known): £.....

Address:

..... Postcode:

Telephone Number(s):

If Company Pension: Date Employment Started: Date left company:

If Personal Pension, please provide Policy Number(s):

PENSION SCHEME 3

Is this an: old Company Pension a Personal Pension or your current employers pension

Name of Pension Scheme/Company:

Managed by (if different): Fund Value (if known): £.....

Address:

..... Postcode:

Telephone Number(s):

If Company Pension: Date Employment Started: Date left company:

If Personal Pension, please provide Policy Number(s):

PENSION SCHEME 4

Is this an: old Company Pension a Personal Pension or your current employers pension

Name of Pension Scheme/Company:

Managed by (if different): Fund Value (if known): £.....

Address:

..... Postcode:

Telephone Number(s):

If Company Pension: Date Employment Started: Date left company:

If Personal Pension, please provide Policy Number(s):