

19th June 2017

Pension Practitioner
Daws House
33-35 Daws Lane
London
NW7 4SD

Dear Sirs

Client: John Launders
NI No: WA425278B
DOB: 12/03/1958



104 Church Street, Market Deeping,
Peterborough, PE6 8AL

Tel: 01778 342 291

Email: advice@liberty-partnership.co.uk


Web: www.liberty-partnership.co.uk

We attach a pension servicing rights authority and would be grateful if you could forward to us full plan information, including any of the following that may apply:

- Scheme name
- Type of pension, i.e. PPP, FSAVC, etc
- Fund valuation date
- Fund value
- Transfer value
- Contributions in history and/or transfer payments in history
- Do any transfers in come from ex-spouse?
- Early exit/surrender/MVR penalties – yes/no – how much?
- Annual charges
- Policy fees
- Integrated life cover – yes/no
- Waiver of premiums – yes/no
- Guaranteed annuity rates – yes/no
- Guaranteed growth – yes/no
- With Profits fund MVA has or may be applied – yes/no
- With Profits fund MVA not applied – yes/no
- Any GMP + %
- Protected Tax free cash – yes/no
- Can the client take benefits under UFPLS
- Can the client go into Income Drawdown
- If renewal commission available please pay to Liberty Partnership Ltd
- What rate is trail commission/fee paid at; how often i.e. monthly, etc
- Please provide a transfer illustration
- Please provide projections to NRD using standard industry growth rates
- Please provide annuity quotation
- Please provide discharge forms
- Please provide list of funds where currently invested with % split
- Please provide a list of all funds available to switch into
- Please provide scheme booklet (where appropriate)

Yours faithfully

Edith Winter

 Liberty Partnership Ltd

Enc



Liberty Partnership Ltd is registered in England with company registration number: 06223376
The company is authorised and regulated by the Financial Conduct Authority registration number: 472792





Pension Practitioner
Daws House
33-35 Daws Lane
London
NW7 4SD

104 Church Street, Market Deeping,
Peterborough, PE6 8AL
Tel: 01778 342 291
Email: advice@liberty-partnership.co.uk
Web: www.liberty-partnership.co.uk

Policy: SSAS Pension Scheme
DOB: 12/03/1958
NI No: WA425278B

Dear Sirs

I hereby transfer all servicing rights for my policy above to Liberty Partnership Ltd, please provide them with full plan information, including all charges and any additional information needed regarding my policy. Liberty Partnership will provide ongoing servicing.

Can you confirm that any commission/fees due will be transferred to them and if so when payments will commence.

Thank you.

Yours faithfully

J A Launders

Mr John Launders

Date: *14th June 2017*

JL Trading Ltd
Halfway Cottage
St Jidgey
Nr St Issey
Wadebridge
Cornwall
PL27 7RE



Liberty Partnership Ltd is registered in England with company registration number: 06223376
The company is authorised and regulated by the Financial Conduct Authority registration number: 472792

