

Existing Pension Information Collection Form

Client Name, Date of Birth & Address	Date

		Pension 1	Pension 2
Company Name & Policy Number			
Type of Pension			
Normal Retirement Age			
Current Fund Value	Protected Rights		
	Non PR's		
Current Transfer Value	Protected Rights		
	Non PR's		
If transfer value is less – How much is:	MVA		
	Transfer Penalty		
Is there any terminal bonus?			
Regular Gross Contributions	Employee		
	Employer		
Does Indexation apply to the regular contribution? At what rate?			
Does Waiver apply to the regular contribution?			
Is there are any additional life cover? If so, please provide details ie amount of cover, premium etc			
Does the plan still receive Contracted Out contributions?			
Are there Guaranteed Annuity Rates attaching to this plan? If so, please provide details of the basis on which they will apply			

In which fund(s) are the monies invested?		
Provide details of the fund range available under this plan. How many funds? Internals / Externals?		
If invested in With Profits. What is the:		
Current Reversionary Bonus		
Company's Free Asset Ratio		
Asset Allocation of WP Fund		
Is it open to new business?		
What charges apply to this pension?		
Allocation Rate		
Bid / Offer Spread		
Annual Management Charge		
Policy Fee		
Other Charges		
If occupational, does the pension include a TFC entitlement greater than 25% of the fund? If yes, provide details and retain evidence on file		
If Section 32. Does the plan contain any GMP? If yes, provide details		
What are the death benefits provided under this plan?		
Does the plan provide the facility for Unsecured Income or Phased?		
Name of contact at Pension Company & Telephone Number		

We would recommend that you always request the following from the existing company:

- A Projection of Benefits Statement to the proposed Normal Retirement Age
- A Transfer Discharge Form
- The lead time to provide the above and any other outstanding information