

# Letter of Authority - SIPP

This Letter of Authority is for information only and does not constitute authority to manage/make changes to the scheme nor does it constitute an application to remove the members pension to another provider/scheme.

## Member/Policy Holder Details

<b>Full Name:</b>			
<b>Date of Birth:</b>		<b>UK NI Number:</b>	
<b>Email:</b>		<b>Phone:</b>	

<b>CURRENT ADDRESS (PLEASE UPDATE YOUR RECORDS)</b>	<b>PREVIOUS ADDRESS (Which is held by the scheme)</b>

## Pension Company Details

<b>Provider:</b>			
<b>Scheme Name:</b>			
<b>Address:</b>			
<b>Policy Number:</b>		<b>Phone:</b>	
<b>Email:</b>		<b>Fax:</b>	

I hereby authorise you to supply **Harrison Brook/BFMI** with all the appropriate information that they require relating to the above policy at the address/contact details supplied below.

<b>Address:</b>	Harrison Brook, 1752, Route Nationale 7, 06270, Villeneuve-Loubet, France		
<b>Email:</b>	ryan.frost@harrisonbrookonline.com		
<b>Phone:</b>	+33 (0)492 080 641	<b>Fax:</b>	

## In particular please provide full details of Defined Contribution Schemes

- Current Fund Value
- Transfer Value
- Exit Penalties/MVA
- Normal Retirement Date & Illustration of Benefits
- AMC of the Policy and Underlying Funds
- SEDOL or ISIN Reference of Underlying Funds
- Other Benefits ( GAR, Waiver of Premium, Life Cover)
- Protected Tax Free Cash Entitlements
- Bonus/Terminal Bonus History of With Profits Funds
- Complete Documentation for Surrender/Transfer of:
  - a) UK SIPP

## And the additional information for Defined Benefit Schemes

- Current Value/Transfer Value
- Proportion of Protected and Non Protected Rights Pre and Post April 1997
- GMP Pre and Post 1988
- Final Pensionable Salary or Average Salary
- Dates of Employments
- Scheme Retirement Date
- Full benefits under the scheme including death, spouse and dependents pension
- Guarantee Period
- Tax Free Cash (or confirmation that Post A Day basis used) available under the scheme and reduced pension if applicable
- Early retirement factors and revaluation figures
- Indexation - pension in payment
- Current funding level of scheme - deficits, etc
- Scheme Booklet

**Member Signature** \_\_\_\_\_ **Date** \_\_\_\_\_