

Dear Sirs

<b>Client/s Name</b>	
<b>Address</b>	
<b>DOB</b>	
<b>Policy/Plan Number</b>	
<b>NI Number</b>	
<b>Signed</b>	
<b>Date</b>	

We are in the process of reviewing the above clients' pension arrangements and require the following information in respect of the above policies:

- Start Date
- Contribution History
- Current Investment Breakdown & Valuations
- Projections to age 65 assuming no further contributions
- Annual Fund Charges
- Plan Charges
- Additional Charges
- Current Transfer Value
- Any transfer penalties or MVA / MVR
- Additional Benefits (such as life cover, guaranteed benefits etc)
- Complete transfer of benefits information pack and required documents.
- Current fund fact sheet(s) for all funds held in this policy.

Please provide the above at your earliest convenience by return email to [samgataaura@tpllp.com](mailto:samgataaura@tpllp.com) and/or to my address below.

Yours faithfully



Mr. Sam Gata-Aura

**True Potential Wealth Management**

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