

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

Full Name:			
Date of Birth:		UK NI Number:	
Email:		Phone:	

CURRENT ADDRESS (PLEASE UPDATE YOUR RECORDS)	PREVIOUS ADDRESS (Which is held by the scheme)

Pension Company Details

Provider:			
Scheme Name:			
Address:			
Policy Number:		Phone:	
Email:		Fax:	

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.

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

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** _____