

FIRST NAME(S) ROBERT + ANGELA

LAST NAME(S) RUFFELL

24 RIFFHAMS DRIVE

REAT BADDOW

ESSEX

POST CODE: CM12 7DD

DOB: 04/08/1961 + 07/02/1965

NI NUMBER: UM03407K + NG532627

DATE: 30 May 2019

Please quote this reference on any reply:

Financial Adviser: Andrew Stephenson

TO: PENSION PRACTITIONER

Dear Sirs

**THIS IS AN INFORMATION ONLY REQUEST**

Policy / Plan Type / Contract No. (s) / (Former Company Name if Applicable):

PENSION NUMBERS  
RUFFELL FAMILY PENSION  
3301-30382-6  
Acc. No. 3301-30340-1

**And any other policy in our names**

With effect from the date of this letter, I/we request that Insight Financial Associates Ltd have access to all policy information for the above contracts(s). This is not a change of servicing request but a request for information only.

**Insight Financial Associates Ltd  
Insight House 7a Alkmaar Way  
Norwich International Business Park  
Norwich NR6 6BF**

**Telephone: 01603 268080 Facsimile: 01603 268088**

**Insight Financial Associates Ltd is authorised and regulated by the Financial Services Authority**

Yours faithfully

Signed: R. E. J. Ruffell

Name: ROBERT RUFFELL

Signed: A. Ruffell

Name: ANGELA RUFFELL





## Insight Financial Associates Information Only Request

### Personal Pension Information Required

The following information is required in relation to the  
attached Personal Pension

#### INCLUDED WITHIN REPLY

- Full Policy Details (Name/Number/Product/Provider/Term) ☐
- Current Premium Details & Premium History ☐
- Start Date ☐
- Selected Retirement Age/Date ☐
- Charges Attached To The Plan ☐
- Is the plan Contracted Out? - NO ☐
- Fund Value (Split Between Protected And Non-Protected Rights) ☐
- Transfer Value (Split Between Protected And Non-Protected Rights) ☐ same as fund
- Available Fund Choices (Please Provide a List With Performance Figures If Available) - Investment Doc. ☐
- Fund Switching Options Charges - n/a. ☐
- Under Trust or Not yes ☐
- Does The Plan Have Waiver Of Premium? n/a ☐
- Are There Any Guaranteed Annuity Rates? no ☐
- Does the plan offer death benefit nominee options yes ☐
- Are There Any Other Options That Are Attached To The Plan? no ☐
- Exit Penalties Attached wind up fee ☐
- What Is The Estimated Maturity Value At Normal Retirement Date (NRD) And Paid Up Projections? ☐
- Projections to age 60, 65 & 70 assuming premiums continuing And if premiums stopped ☐

If the plan is invested in a with profit fund please also provide: n/a

- Details of attaching "Reversionary" and "Final bonuses". ☐
- The Minimum Maturity Value At Selected Retirement Age. ☐
- The bonus rate history for the last 5 years. ☐
- The asset split of the fund, i.e. equity content etc. ☐

Please provide the following literature:

- Discharge Forms - none ☐
- Fund Switch Form - none ☐
- Key Features Document ? ☐
- Fund Information ☐