



**FINANCE SHOP**  
Independent Financial Advisers

38-39 Baker Street  
Gorleston-on-sea  
Great Yarmouth  
Norfolk  
NR31 6QT

T: 01603 595960

Strategic Placements  
info@strategicplacements.com  
info@pensionpractitioner.com

20 June 2018

Dear Sirs,

Re: Kevin Adams - Policy Number - 00803228RV

I enclose an authority for this request. Please provide the following policy information to us as soon as possible:

- Date plan commenced
- Is the plan written under occupational pension rules?
- Date plan made paid up (if applicable)
- Retirement age
- Is there a protected retirement age?
- Projected benefits to age 65 on an ongoing / paid up basis
- Fund and transfer values
- Funds currently invested in & percentage split
- Is the plan segmented / can the client transfer away and continue regular contributions?
- Plan type
- Indexation? (if yes, at what rate?)
- Waiver of Premium?
- Death Benefit
- What are the current death benefit nominations?
- Has the client got entitlement to more than 25% tax free cash?
- If yes, please confirm the amount.
- Do the scheme rules allow tax free cash to be paid after age 75?
- Does the plan include any Guaranteed Annuity Rates or Guaranteed Pension amounts?
- Does the plan include any other Safeguarded benefits?
- Current with profits bonus rates / details of guaranteed bonus rates (if applicable)
- Last 5 years bonus rates
- Asset Allocation of with profits fund (if applicable)
- Is the with profits fund an open or closed fund?
- With profits fund financial strength rating
- MVR (if with profits)
- Guaranteed no MVR date (if with profits)
- Premium history & date made paid up (if applicable)
- Details of all charges applicable to the plan
- What funds can the client switch to?
- What is the cost of switching?
- What is the maximum number of funds that can be held?
- Are external funds available? (If yes, give details)
- Details of any current trail / renewal commission / Adviser charges being paid?
- Can this policy support new Adviser charging / ad hoc fees?
- Is Flexi-Access Drawdown and / or UFPLS available with this plan?
- If Flexi-Access Drawdown is a future option, is inheritable Drawdown via 'Nominee' and 'Successor' accounts available?
- Please provide transfer discharge forms

Thank you in advance for your swift response.

Yours faithfully

Megan Michalski  
Trainee Personal Assistant  
E: mmichalski@fs-ifa.com  
T: 01603 595960 ext. 847

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[WWW.FINANCESHOPGROUP.COM](http://WWW.FINANCESHOPGROUP.COM)



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## LETTER OF AUTHORITY

Provider: STRATEGIC PLACEMENTS

Client(s) Full Name KENIN ADAMS

Date(s) of Birth 29/11/59

National Insurance  
Number(s) WK281265B

Address 12 HONORSUCKLE CLOSE, NORWICH, NORFOLK, NR4 7SY

Scheme / Policy / Plan

SIPP

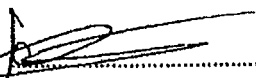
Policy Number(s) 00803228RV

Please accept this letter as authority to disclose any details regarding my / our policies to Finance Shop Ltd. Registered Office: North Wood Place, Octagon Business Park, Little Plumstead, Norwich, Norfolk NR13 5FH. FCA Number: 551177.

In case of incorrect policy numbers or omissions, please extend this authority to any policy / plan which I / we hold with your company.

Thank you for your assistance in this matter.

Yours faithfully

Signature(s): 

Date: 12/06/18

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