



# LJ FINANCIAL PLANNING LIMITED

Chartered Financial Planners

750 Mandarin Court Warrington Cheshire WA1 1GG

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Cranford S. 1 The Pavillions Cranford Drive Knutsford WA16 8ZR		I hereby appoint LJ Financial Planning Limited as my Independent Financial Adviser. To enable them to give me advice on the following contracts I hereby authorise you to transfer the agency of the contracts to LJ Financial Planning Limited and provide the information below appropriate to the contracts detailed.	
Policy Number	Type of Contract	Category of Contract	
NZ496951B	SSAS	Protection / <del>Pension</del> / Investment / Savings	
		Protection / Pension / Investment / Savings	
		Protection / Pension / Investment / Savings	
Protection	Pension	Investment	Savings
Type of Cover Sum Assured Current Premium Start Date End Date Guaranteed/Reviewable Next Review Date Review Frequency Indexation Fund Value Surrender Value Charging Structure Fund Invested In Funds Available	Fund Value Transfer Value Current Contribution Charging Structure Funds Invested In Other Available Funds Detail of Any Guarantees Projections to 65 (Paid Up & Non-Paid Up) Protected Tax-Free Cash Any USP Being Taken Next USP Review Date GMP Details Preserved Pension Service Start Date Service End Date Final Remuneration Full CETV Death Benefits Scheme Funding Position Transfer & Discharge Form	Type of Plan Amount Invested Fund Value Surrender Value MVA Applied Charging Structure Start date End date Funds Invested In Other Available Funds Income Being Taken Income Frequency Income Taken To Date Sum Assured Other Death benefits Any Guarantees	Type of Plan Current Contributions Fund Value Surrender Value Charging Structure Start date End date Funds invested in Other Available Funds Sum Assured Any Guarantees

Clients' Full Names CARL ANTHONY RLINN

DOB 18/04/1973 National Insurance No NZ496951B

Postal Address 44 ACRE MOSS LANE, KENDAL, LA9 5QE

Signed [Signature]

Date 22/1/16

Office Use Only	Adviser Name: KANE PLATT.						Paraplanning			Admin		
Source	Own		KW		PO		KB		AG		KM	