



**BURFIELD**  
FINANCIAL PLANNING

Pension Practitioner  
Draws House  
33-35 Draws Lane  
London  
NW7 4SD

20<sup>th</sup> November 2015

Dear Sirs,

**Plan Member Name – David Wallington – WE 825811 D**

Please find attached a letter of authority from our above mutual client to release information on his pension contract held with your company.

I would be grateful if you would supply the full details listed on the attached sheet in respect of his plan. I also need a retirement options pack and transfer pack

Please act on this request as soon as possible, and if there are any issues with providing the information please contact me immediately. Please provide the corresponding pack with the correct questionnaire.

Our address details are as below. If you can email the information please email it to [dkelleher@burfieldfp.co.uk](mailto:dkelleher@burfieldfp.co.uk)

Thank you for your co-operation in advance.

Yours faithfully

Daniel Kelleher  
Administrator

Burfield Financial Planning Limited, 6 Verity Court, Middlewich, Cheshire, CW10 0GW.  
Telephone 0800 103 2500 Email [enquiries@burfieldfp.co.uk](mailto:enquiries@burfieldfp.co.uk) Web [www.burfieldfp.co.uk](http://www.burfieldfp.co.uk)

Registered Office: Burfield House, St. Mathews Close, Appleton, Warrington, Cheshire WA4 5DE.

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**Letter of Authority**

<b>Date:</b> 17/11/2015 <b>Adviser Firm Name:</b> Burfield Financial Planning <b>Address:</b> 6 Verity Court, Middlewich, Cheshire <b>Postcode:</b> CW10 0GW <b>Tel No.:</b> 0800 103 2500 <b>FCA Number:</b> 521077	<b><u>Policy Holder Details</u></b> <b>Policy Holder Name:</b> David Wallington <b>DOB:</b> 13 <sup>th</sup> June 1965 <b>Address:</b> 76 Kirkwood Grove, Medbourne, MILTON KEYNES <b>Postcode:</b> MK5 6FP <b>National Insurance Number</b> NE 82 58 11 D
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To: Pension Practitioner

I authorise Burfield Financial Planning to request information only in relation to my pension and investment plans and policies.

In addition, I authorise copies of transfer packs and valuations to be sent directly to them.

<b>C*</b>	Specific policy(cies) only - numbered as follows:
<b>D*</b>	All of my/our policies. (Please provide at least one policy number as a reference)

Signature: D. Wallington Full Name:

Date: 19-11-15

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Telephone 0800 103 2500 Email enquiries@burfieldfp.co.uk Web www.burfieldfp.co.uk

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## Pension Provider Question

Date: 20/11/2015

**David Wallington - NE 825811D**

**For each plan in question please provide the following:**

Cash Equivalent Transfer Value

Commencement date

Date of Leaving

Normal Retirement date

Any guaranteed benefits or guaranteed annuity rates

Any Transitional protection

Any protected PCLS / Maximum

Any GMP / Amount – Breakdown of Pre and Post GMP

Immediate Vesting Quote - If client were to take benefits now **a)** With Max TFC **b)** Without TFC

Statement of benefits and projection to NRD

Pension Discharge Forms for full transfer

Escalation & Revaluation Rates

Does the Plan Support Flexible Access Drawdown

Early Retirement Options and Early Retirement Discount Factors