

The below can be used as a template to start gathering information in relation to your investment arrangements. Please be aware that the answers you receive may require further investigation and this list of questions should not be seen as exhaustive.

Provider  
Address  
Address  
Address  
Address  
Postcode

Date

Dear

<b>Name</b>	
<b>Date of Birth</b>	
<b>National Insurance Number</b>	
<b>Policy Number/Scheme Number</b>	

Could you please provide the following information with regards to all elements of the plan(s) detailed above.

1. Type of plan/policy
2. Current value
3. Contributions paid and contributions for the current tax year
4. Current Transfer value - including any penalties on encashment
5. All charges applicable to this plan and the investments, including any exit charges
6. Sum invested including any transfers in
7. Details of any withdrawals or surrenders that have been made
8. Please advise whether there are any guaranteed benefits with the plan.
9. A list of funds that are available on the plan and details of how many can be held at any one time, along with any limitations/charges for fund switches.

Yours sincerely