

Checklist for Submitting a Letter or Instruction for a Pension Sharing Report to BlueSKY

Item	Comments
A letter of authority for each pension scheme that the parties have. (original 'wet signature' versions still required by most providers)	Y/N
Health and smoker status confirmed. (or completion of the Client Information form sent to you with our fee quote)	Y/N
Enhanced Annuity Form if my client has health issues. (contact BlueSKY for the relevant form if required)	Y/N or N/A
State Pension Forecast (obtained online)	Y/N or N/A
Any other relevant details (e.g. if ring-fencing calculations required, relevant dates etc.) Additional Comments:	Y/N or N/A
Your Letter of Instruction contains: <ul style="list-style-type: none"> • Clear instructions on the calculations required • Confirmation that our fee is acceptable and who is responsible for paying • Confirmation of whether any deadlines apply to the production of the report • Confirmation of who the report is to be sent to • Confirmation of who should be approached for outstanding information 	