Document Checklist

To enable us to prepare your report as swiftly as possible, please return the following paperwork to our offices as a single email (or paper) bundle. Please collate the information at your end before sending to us.

Required Information	Number of Documents Enclosed	Enclosed ✓
Client Basic Details Word Document	1	
Retirement Health Questionnaire (NB: only required if client has stated that they suffer from potentially life shortening medical conditions)	1	
Instruction	**Number of Documents Enclosed**	**Enclosed ✓**
Jointly Signed Letter of Instruction	1	
Pension Details	**Number of Documents Enclosed**	**Enclosed ✓**
A Letter of Authority for each UK Pension Scheme Held* To be Fully Completed by your Client		
Pension Statements/Valuations Most Recent Statement Available (or Obtained Online)		
State Pension Forecast (https://www.gov.uk/check-state-pension)	1	
Lifetime Allowance HMRC Protection Certificate (only relevant for some clients - typically with pension funds in excess of £1M)		

* Most pension schemes will accept letters of authority by email; however, a few schemes still insist on receiving hard copies with wet signatures. Please retain any hard copy versions of the letters of authority in case we need the original documents.