

Introducer Submission Form for Pension Transfers

Client Name
Date of Birth
Ceding Scheme

Documents Enclosed:

Client Profile Yes / No
Pension transfer Questionnaire Yes / No
Retirement Options Questionnaire Yes / No (only if transfer for immediate benefits)
Letter of Authority Yes / No
Transfer statement Yes /No
IFA IVC form Yes /No

Outline of client's objective for this transfer

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If a transfer goes ahead, will you be giving on-going advice on any new plan ? Yes /No

Fees

Where fee basis is used will you require a fee to be taken from any new policy in addition to Juniper Fee? Yes / No If yes – please specify amount £

Do you want fund based renewal added to any new contract – if so how much?%

Name.....

Company.....

Date.....

**Please return with documents and cheque for initial advice fee made payable to
Juniper Pensions**