

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 available Yes / No (we will require this if a transfer goes ahead)

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/ Commission

If 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 (up to £1,000) £

Do you want trail commission added to any new contract – if so how much?%

Name.....

Company.....

Date.....

Please return with documents and cheque for initial submission fee of £117.50 made payable to Juniper Pensions