

QROPS - Client Information Form

In order for us to advise you regarding the merits of transferring your existing pension benefits to an overseas arrangement, it is essential that we obtain accurate information. Please complete the following as comprehensively as you can. If you omit any sections our advice will be based only on the information provided. The scope of our advice is limited to the review of your existing pension(s). It is not intended to provide you with a comprehensive financial planning review. Should you wish us to conduct a full review please contact us.

Personal Details:

Title:	Mr	Mrs	Ms	Miss	Other:	
Surname:						
Forenames:						
Date of birth:			UK National Insurance number:			
Address:						
Telephone numbers:	Home:			Mobile:		
e-mail address:						
When did you move overseas from the UK?						
In which country are you domiciled?						
In which country are you resident?						
Do You Plan To Reside In UK any time in the future?					Yes	No
Have you registered with HMRC as non resident through form P85?						
			Yes		No	
State of Health:						
Marital Status:	Single	Married	Co-Hab/Civil	Widowed	Divorced	
Date of birth of spouse/partner:						

Existing pension arrangements

Scheme / Provider Name	Policy number and/or Reference number	Current value if known

Have you taken or are you taking any benefits from any of the arrangements quoted above? If so please detail:

Which of the above arrangements do you want us to assess for a potential transfer to a QROPS

Objectives – please describe below your objectives in respect of your pension benefits/arrangements:

