CASE SUBMISSION CHECKLIST

Client Name:

Introducers Name:

Introducers Firm:

INTRODUCER FEE REQUIREMENTS (EXCLUDING GROVE FEE)

Your initial fee (as a % or fixed amount):

Your ongoing fee (as a % or fixed amount):

PLEASE PROVIDE THE FOLLOWING DOCUMENTS WHEN SUBMITTING YOUR CASE

☐ Client Completed Enquiry Form

☐ Client completed Health Data Form

☐ Grove's Fact find

☐ Full CETV Ceding Scheme Transfer Pack

☐ Ceding scheme early retirement illustration. For all cases where client is aged 55 or older; if the scheme does not allow early retirement for this client, please state:

☐ Most recent Workplace Pension Scheme (WPS) data

CLIENT REQUIREMENTS

If a transfer is to go ahead, is the preference to a new provider or existing plan?

☐ New Provider

☐ Existing Plan

If existing, please provide policy number and name:

Policy Number:

Policy Name:

Is the client wanting to take immediate benefits? If so, how much?

Fund Choice	%

ADDITIONAL NOTES: