NEW CASE SUBMISSION CHECKLIST

Please complete all sections

GROVE
PENSION SOLUTIONS

BASIC DETAILS

Introducers Firm: Introducers Name:

Client Name: Preferred point of contact*:

*THE INTRODUCER WILL RECEIVE THE WEEKLY UPDATE, UNLESS AN ALTERNATIVE POINT OF CONTACT IS NAMED

PREFERRED RECEIVING SCHEME

Please tick; ☐ **New Plan** or ☐ **Existing Plan (complete below);**

Policy Number: Pension company:

PREFERRED INVESTMENT

Please tick; ☐ **model portfolio*** or ☐**your own 'selected' portfolio*** or ☐ **funds listed below**;

Fund Name	%age	ISIN / SEDOL Code
	%	
	%	
	%	
	%	
	%	
	%	
	%	
	%	
	%	
	%	
TOTAL	100%	

*If you have chosen a portfolio option above, please provide details including the current fund breakdown, all associated charges and any other supporting information. If you are unable to provide the ISIN / SEDOL code, we cannot guarantee investment into the preferred fund.

YOUR INTRODUCER FEE REQUIREMENTS (EXCLUDING GROVE FEE)

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

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

PTO for document checklist

YOU MUST ENCLOSE THE FOLLOWING DOCUMENTS:

☐ Enquiry Form

☐ Health Data Form

☐ Grove's Fact find

☐ Full CETV Ceding Scheme Transfer Pack including discharge forms

☐ Ceding scheme early retirement illustration, for all cases where client is aged 55 or older

☐ Most recent Workplace Pension Scheme (WPS) details or a completed Enquiry Form for this

ADDITIONAL NOTES: