

PENSION FREEDOM ENQUIRY FORM



Dear Sirs,

I have asked Grove Pension Solutions Ltd of New Grove House, Murray Road, Orpington, Kent BR5 3QY to advise me on my pension benefits.

Please will you provide them with any information that they may require regarding all my pension policies with you. Yours faithfully,

Signed:

Date:

Please complete the following information about you:

Title: Forenames: Surname:

Address:

..... Postcode:

Date of Birth: National Insurance No:

Spouses Date of Birth:

Home Tel: Mobile Tel:

Email:

Do you have a current workplace pension? Yes / No

Do you have any other pensions? (in addition to those you've asked us to investigate) Yes / No

We prefer to update you via email or by sending a text (SMS) message to your mobile number; please ensure these are provided where possible.

Please complete the following details about the pension you wish us to investigate:

Pension Scheme Name:

Policy No. or Member No:

Employer Name:

Pension Contact Telephone number (if known):

Is this pension your current employer's pension scheme? Yes / No

IMPORTANT !!

It is essential you fill in this section. Without these details we can't locate your pension and will not be able to provide regulated advice. State pensions can't be released.

If you have pensions with more than one provider, you will need to complete one enquiry form for each. Photocopies of this form are acceptable. Additional enquiry forms can be downloaded at www.grove-pensions.co.uk/download.

If you have any queries, you can either telephone 01959 534 082 or email info@groveps.co.uk.

After completing, please send this form to: FREEPOST GROVE. You do not need a stamp or need to write anything else on the envelope.

Our initial consultation is free and you're under no obligation to proceed with anything.