

To:

Penfam

Links Cottage, 384 Seafront, Hayling Island, Hampshire, PO11 0BD

Tel: 0870 405 5535 E-mail: penfam@excaliburactuaries.co.uk

1. Your Details

Firm Name:

Your Name:

Address:

Town:

Postcode:

Ref:

Telephone:

Fax:

Dx:

E-mail:

2. Client Details

Your Client

Mr/Mrs:

First Name(s):

Surname:

Date of Birth:

Client's Spouse

Mr/Mrs:

First Name(s):

Surname:

Date of Birth:

3. Important Information

Is the report to be prepared jointly on behalf of both Husband and Wife?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have proceedings for Ancillary Relief been issued?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Please indicate if the report is required by a particular date and why.	<div style="border: 1px solid black; height: 80px; width: 100%;"></div>

4. Please Attach

? Pension Scheme Information Form(s)	Yes <input type="checkbox"/> No <input type="checkbox"/>
? Client's Authority Letter	Yes <input type="checkbox"/> No <input type="checkbox"/>
? Spouse's Authority Letter	Yes <input type="checkbox"/> No <input type="checkbox"/>
	<input type="checkbox"/>

5. Signed Authority (To be completed by hand)

I/We confirm that I/we have read and accept Penfam's **Terms and Conditions** of service and instruct Penfam to prepare a pension valuation report in accordance with the information attached.

Instructing Solicitor

Spouse's Solicitor (If joint report)

Signed..... **Signed**.....

Date:..... **Date**.....

Important: The following page of notes indicates various issues to be addressed in the Instructions to us.

Guidance Notes for the Solicitors

Notes for the calculations

- Are we to use pensions built up to date for the calculations, if not, please specify the appropriate effective date?
- Is the purpose of the calculations to assist in agreement on offsetting or to agree pension sharing?
- Are State benefits to be included? If so, do we have details of entitlements?
- If sharing calculations are required, what proportions of income husband/wife are required?
- If the commencement of pension payments is different between husband/wife, do you wish us to capitalise the difference in values as part of the calculations?
- If an internal PSO is not allowed by the pension scheme, do you wish us to provide any additional advice in relation to the investment of the external transfer?
- If there are possible alternatives in relation to implementation of PSOs, do you wish us to provide any commentary on the options?

On receipt of the information above and your Instructions, we will inform you of any further information required, any queries we may have, and we will then provide an estimate of the time to complete the Report and a quotation of fees.