

Paul Young IFA-Pension Advice Enquiry Form

Please make a general assessment of my existing pension benefits and explain how they might be improved with or without additional funding.

Title	
Surname	
Firstname	
Address	
Postcode	
Daytime Telephone	
Mobile Telephone	
E-Mail Address	
Date of Birth	
Sex	Male Female
Marital Status	Single Married With-Partner
State of Health	Excellent Average Poor
Employment Status	Employed Self-Employed Both
Occupation	

Your Current Pension Position

Do you have a Stakeholder or Personal Pension plan? Yes No

Do you hold benefits in a former employer's pension scheme? Yes No

Are you a member of a scheme right now? Yes No

Please enclose a copy of the most recent statement for each scheme or policy

Your main areas of Interest

Making regular or lump sum contributions into a Pension Plan Yes No

- I wish to Investment a lump sum of £_____

- I wish to Investment £_____ monthly/annually

To have my existing pension arrangements reviewed Yes No

Help me to determine my existing provision and potential shortfall Yes No

At what age would you like to start receiving your retirement income? _____

How much income would you like to receive at retirement in today's terms? £_____

Your Income

Basic annual Salary	
Average annual bonus and/or commission	
Self Employed net profit	
Self Employed Year End Date:	

Apart from pensions do you have any other financial issues on which you would like advice? (Please list)

Notes/Comments

Please post to:

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Paul Young IFA
72 High Street
Harrold
Beds
MK43 7BH

Or scan and email to:

pensions@paulyoungifa.co.uk
