



Case Summary For Completion by Introducing IFA

1. Please provide a brief summary of the background to the case

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2. Please confirm any valuations you have on the client's existing pension plans including the dates (up to date valuations will be requested by us but may take several weeks as other information is also requested at the same time).

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3. If any of the benefits arise from an occupational scheme please confirm whether, in relation to that employment, the client was a controlling director or a "high earner".

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4. Is there anything else you think it would be helpful to know about at this stage?

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