

# TRANSFER BUREAU CASE SUBMISSION FORM



## Adviser Firm Details

Adviser Firm Name

Contact Name for O&M at Adviser Firm

O&M Contact's Email Address

## Client Details

Client Title (eg Mr)

Client Surname

Maiden / Previous Surname

Client Forename(s)

NI Number

Date of Birth

Marital Status

Married   
Single

Divorced   
Separated

Widowed   
Same Sex Partner

Common Law Spouse   
Civil Partnership

Partner's Name

Partner's Date of Birth

## Pension Scheme

Pension Scheme Name

Same Partner and Marital Status now as when left Pension Scheme?

Yes

No

Specific Scheme Admin Contact Name (if known)

Scheme Phone No.

Scheme Email Address

## Report & Service Details

Please tick this box to confirm the original letter of authority has been sent directly to the Pension Scheme administrators

Cash flow Modelling

Switch to Spouse's Pension at Member Life Expectancy

Member Pension Forever

Alternative retirement age to illustrate benefits at\*

Tax Rate in Retirement (default is 20%)

*\* Reports will be produced at the scheme normal retirement age and alternative retirement age – this is usually early retirement 5 years before. If you wish to show a particular age, indicate the age above.*

## Send Case Paperwork to

Any queries, please telephone O&M on 01206 805405

**Please ensure you are providing O&M with any information you may already have acquired from the pension scheme. In particular, any Transfer Value statements issued within the last 12 months.**

### EMAIL TO O&M

[newcases@ompensions.co.uk](mailto:newcases@ompensions.co.uk)

### POST TO O&M

O&M Pension Solutions Ltd  
3 The Courtyards, Phoenix Square  
Wyncolls Road, Colchester, CO4 9PE

All cases will be acknowledged via email within 48 hours of receipt at O&M

v5.0

# PRODUCT PROVIDER FORM



## Client Details

Title	Surname
Forename(s)	
Pension Scheme Name	

## Personal Pension

Lowest Charging product

or

Specific Product *(bear in mind some providers may have more than one product)*

\_\_\_\_\_

Adviser Charge Options

Facilitated by Product Provider       Paid Direct by Client       No Adviser Charges

INITIAL ADVISER CHARGE

Either \_\_\_\_\_ % of Transfer Value OR Specific Amount of £ \_\_\_\_\_

ON-GOING ADVISER CHARGE                  

Either \_\_\_\_\_ % of Fund Value OR Specific Amount of £ \_\_\_\_\_

Frequency Paid:      Monthly      Quarterly      Biannually      Annually

Investment Funds e.g. 50% balanced managed, 50% cautious managed  
*(if nothing selected the report will be based on 100% balanced managed)*

## Section 32

A Section 32 is a special kind of pension plan which can accept transfers from occupational pension schemes. Since 6 April 2012, there is very little difference between a Personal Pension and a Section 32 with regard to the way in which the benefits can be paid. Therefore, the range of Section 32 products available is extremely limited and very few (if any) facilitate adviser charging.

No Section 32 comparison required

Lowest charging provider *(bear in mind product facilitated adviser charging is unlikely to be available)*

Specific product *(bear in mind some providers may have more than one product)*

\_\_\_\_\_

Investment Funds e.g. 50% balanced managed, 50% cautious managed  
*(if nothing selected the report will be based on 100% balanced managed)*

# LETTER OF AUTHORITY



## Pension Scheme Details

Employer Name	
Pension Scheme Administrators	
Pension Scheme Address	
	Postcode
Telephone Number	Fax Number

## Client Details

Title	Surname	Forename(s)
Maiden / Previous Surname		Date of Birth
Address		
		Postcode
Employee Payroll Number	NI Number	

## Client Authority

Please accept this letter as my authority for you to release information as requested by my financial advisers detailed below **and their agents O&M Pension Solutions** (of 3 The Courtyards, Wyncolls Road, Colchester, Essex, CO4 9PE) to enable them to conduct a full review of my scheme benefits.

Signed	Date
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## Financial Adviser Details

Contact Name	
Company Name	
Address	
	Postcode