

# Authority Letter

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Postcode \_\_\_\_\_

Tel 1 \_\_\_\_\_

Tel 2 \_\_\_\_\_

DOB \_\_\_\_\_

Nat Ins No \_\_\_\_\_ (if known)

Marital Status: Single  Married  Divorced  Widow(er)  With partner  Separated

Spouses DOB \_\_\_\_\_

Dear Sirs,

Simply Retirement will be providing me with advice about my retirement planning. They will be acting as my agent and servicing my plan moving forward. Please amend your records accordingly to show Simply Retirement as my adviser / agent and provide any information they request about my pension plan(s).

I intend this authority to be in respect of the following pension company(s) and for all pension policies I have with that company, including the ones listed.

Please correspond directly with Simply Retirement.

if ticked, I would expressly ask that you do not forward information to any previous agent.

if ticked, please forward an additional copy of the information to me.

Company	Policy Number
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Signed \_\_\_\_\_ Date \_\_\_\_\_