

LETTER OF AUTHORITY

Dear Sir / Madam

Please accept this letter as I have authorised the following company to obtain information on my behalf in relation to my policy/account shown below. Would you please provide the company (and its representatives) with the required information as per the attached request. As I presently live in Australia I would like to **consider** the transfer of my benefits from the Scheme to a QROPS registered in Australia, we will therefore require a current equivalent transfer value, a list of any exit penalties and the required paperwork if we do decide to proceed.

Aspect Wealth Advisers

Street Address:

Level 1, Unit 5
81 Bishop Street
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Mail to:

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AUSTRALIA

T: + 61 7 3354 9000

F: + 61 7 3354 9090

E: enquiry@aspectwealthadvisers.com.au

Title: <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other	
Name:	
Date of Birth:	Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Defacto
National Insurance Number:	
Address:	
	Postcode:
Email:	
Telephone Home _____ Work _____ Mobile _____	
Please indicate the date you first arrived in Australia <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<small>Notes: For migrants to Australia, generally this should be the date you arrived in Australia. For Australian citizens, this should be the date you returned from the UK.</small>	
Please indicate the date you were last a resident of the UK <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<small>Notes: This is the day before migrating to Australia and/or leaving the UK</small>	
Residency Status <input type="checkbox"/> Citizen <input type="checkbox"/> Permanent <input type="checkbox"/> Temporary	
Name of UK Pension Fund:	
Address:	
	Postcode:
Policy Number or Reference Number:	
Type of UK Pension Fund <input type="checkbox"/> Company <input type="checkbox"/> Personal <input type="checkbox"/> AVC <input type="checkbox"/> FSAVC <input type="checkbox"/> SIPP <input type="checkbox"/> SSAS <input type="checkbox"/> Other	
Signature	Date <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>