

# PRELIMINARY FINANCIAL PROFILE

(Issued as at 01/03/12)

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Yes, I would like to be contacted to arrange a free one hour appointment to discuss my pension and other UK financial matters.

Yes, I would like to receive free copies of the following reports:

1. Pre Departure Booklet    2. Fact Sheet    3. Traps Advice

## Personal Details

Name	Name of Partner
Date of Birth <small>[ d   d ] / [ m   m ] / [ y   y ]</small>	Date of Birth <small>[ d   d ] / [ m   m ] / [ y   y ]</small>
Occupation	Occupation

## Contact Details

Current Address	Future Address
Telephone Number (Home)	Telephone Number (Mobile)
Email Address	

## Pension Details

Applicant	Partner
<b>Type of Pension</b>	<b>Type of Pension</b>
Final Salary (Company) <input type="checkbox"/>	Final Salary (Company) <input type="checkbox"/>
Money Purchase (Company) <input type="checkbox"/>	Money Purchase (Company) <input type="checkbox"/>
Personal Pension <input type="checkbox"/>	Personal Pension <input type="checkbox"/>
Other <input type="checkbox"/>	Other <input type="checkbox"/>
Date Pension Started <small>[ d   d ] / [ m   m ] / [ y   y ]</small>	Date Pension Started <small>[ d   d ] / [ m   m ] / [ y   y ]</small>

Please turn over to complete this profile



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## Emigration Details

Estimated Date of Departure  Type of Visa

## Other Details

Is there anything else you want to tell us?

How did you find out about Global Pension Transfers?

Signed (Applicant)

Signed (Partner)

Date

Date

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