

REQUEST TO RETAIN ADVISER

WHAT IS THIS FORM FOR?

This form is used to request that your existing relationship with your adviser is retained in place on your pension when you relocate between jurisdictions. Please note that some jurisdictions specifically preclude advisory relationships to remain in place with overseas advisers, and you should check that your adviser will still be able to advise you in your new jurisdiction. IFGL Pensions retains the discretion to therefore decline a request to retain your adviser where we are aware that this is not permitted under local regulations. **However, we will not check this for you so you need check whether you are able to retain your adviser and you should discuss this with the adviser you are retaining.**

Member details

Title:	<input type="text"/>	Full forename(s):	<input type="text"/>
Surname:	<input type="text"/>	Date of birth:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Permanent residential address:	<input type="text"/>		
Previous address:	<input type="text"/>		
Home telephone number:	<input type="text"/>		
Email address:	<input type="text"/>		

Existing financial adviser details

Company name:	<input type="text"/>
Financial adviser name:	<input type="text"/>
Contact email address:	<input type="text"/>
Registered address	<input type="text"/>

Duration of relationship with adviser: years months

I wish to:

- Retain my existing adviser for financial advice around my pension
- Retain my existing adviser for investment advice upon the assets held within my pension*
- Retain my existing adviser for BOTH financial advice and investment advice on my pension*

*Please note in some circumstances IFGL Pensions may require that investment advice is provided within the jurisdiction in which you are residing.

Signed: