

Additional Notes – Documents Required

State Pension Forecast

You will each need to obtain and provide your State Pension Forecast. If you have a Government Gateway Account, this will take about five minutes, if not it will take more like half an hour.

Please go to:

<https://www.gov.uk/check-state-pension>

1. Click the link “Start Now”. (In green with white writing)
2. Sign in using your government gateway user ID and password.
3. Opt for an access code via text or voice call and click continue.
4. Input the access code and click Continue.
5. The system will show your state pension summary.
6. At the bottom of the page there is an icon and link to print the summary.
7. Please print it, scan it, and upload it, using the link I will send you.

Setting up a gateway Account:

At the sign in page under the heading New users of Government Gateway Click Create sign in details and follow the instructions.

This will take about half an hour.

You will need your NI Number, driving licence and passport or the like.

Pension Paperwork

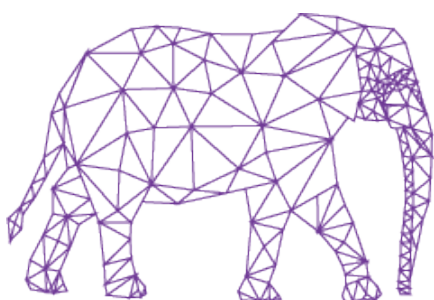
Please provide copies of all documentation you hold relating to your pensions. For your own security, please scan these and upload the using the link I will provide.

I will review those and should be able to extract much of the information I need. The less I have to ask the more quickly the insurance company or scheme administrators are likely to respond.

Letter of Authority

I have supplied a blank Letter of Authority. This is an editable PDF, so that you can complete it on screen. Please fill in all the boxes, if you don't, the insurance company or scheme administrators will not accept it. You will then need to print this out and physically sign it, for each scheme. Pension administrators and insurance companies will only accept a real “wet signature”.

Please complete one for each pension, print it out, hand sign it, scan it and upload it using the link provided.



THE
PENSIONS
EXPERTS