

Background form (2 pages) – please complete to best of your knowledge for yourself

Title and full name	
National Insurance Number	
Solicitor's title and name	
Solicitor's company/address	
Solicitor's case reference	
Higher rate tax payer (y/n)	
Ill-health (y/n) If Ill-health brief details	
Current employer Current employer pension scheme name Pension reference number	
List all other pensions not in payment (ignore state)	
List all pensions in payment	
Any Attachment (Earmarking) Orders	

employment history in chronological order (earliest first)					Last two columns ONLY if pension is in payment	
date joined scheme	date left scheme (if applicable)	appx salary at leaving or appx salary now (£)	employer's name + pension scheme contact email & telephone number	pension scheme name + your reference #	date retired + tax-free cash sum taken	gross pension pa on retirement + gross pension pa now

Additional notes re pensions – please spell out any transfers/consolidations inc transfer amount & date