

Retirement Illustration Request Form.



Please complete the below form and email it to your respective account or business development manager. On receipt an illustration will be produced using the information and returned to you via e-mail in a PDF format. Standard turnaround times are 24 hours but this can vary depending on the complexity of the case or. Delays could also result from incomplete information being provided to us.

Prepared for – Client Name

Financial Adviser

Adviser Telephone No

Adviser Email

Client Details

Date of Birth (dd/mm/yyyy)

What age do you wish to retire?

The Structure of Your Contributions

Currency:

Value of Lump Sum Investment and/or Transfer

Value of regular contributions (if applicable)

Frequency of regular contributions (if applicable)

Selecting Your Plan Structure

Indicate your product e.g. OPES Advanced

Number of QROPS transfers (if applicable)

If an Initial lump sum benefit is required at retirement please specify (% or amount)

If an annual income is required at retirement please specify (QROPS may be subject to limits) (% or amount)

Contribution and Fee Summary

		Initial	Annual
OTAP Product Charge	(% or amount)	<input type="text"/>	<input type="text"/>
Investment Charge if applicable	(% or amount)	<input type="text"/>	<input type="text"/>
Adviser Advice Fee if applicable	(% or amount)	<input type="text"/>	<input type="text"/>

Please ensure that all the relevant sections have been completed and email the request for illustration form to your respective account or business development manager at Overseas Trust & Pension. Alternately please email it to renu@overseaspension.com and a courtesy copy your respective account or business development manager.

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