

## Personal Details

### Self

### Spouse

Title \_\_\_\_\_ Title \_\_\_\_\_

First Names \_\_\_\_\_ First Names \_\_\_\_\_

Surname \_\_\_\_\_ Surname \_\_\_\_\_

Date Of Birth \_\_\_\_\_ Date Of Birth \_\_\_\_\_

Home Address \_\_\_\_\_

Suburb/Town \_\_\_\_\_ City \_\_\_\_\_

Phone Numbers: Home \_\_\_\_\_ Phone Numbers: Home \_\_\_\_\_

Work \_\_\_\_\_ Work \_\_\_\_\_

Mobile \_\_\_\_\_ Mobile \_\_\_\_\_

Fax \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email \_\_\_\_\_ Preferred Email \_\_\_\_\_

NZ IRD No: \_\_\_\_\_ NZ RD No: \_\_\_\_\_

UK National Insurance Number \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_ UK NIN \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_

Nationality / Citizenship \_\_\_\_\_

Date of arrival in New Zealand \_\_\_\_\_

NZ Residency status i.e. visa type \_\_\_\_\_

When / how is best to contact you \_\_\_\_\_

At what age do you wish to retire \_\_\_\_\_

What other assets do you hold for retirement \_\_\_\_\_

If you left any of the following in Britain – please provide details – as requested overleaf

1. Life assurance / protection.  
Whole of Life, Endowment or Critical Illness
2. Investments.  
Unit or Investment Trust / OEIC, Life Assurance Bond (e.g. With Profits Bond), ISA & PEP, rental property
3. Pension contracts.  
Personal Pension / SIPP, FSAVC or AVC , Rebate Only (“Contracted Out” of SERPS)  
Retirement Annuity Contract (RAC or S226), Section 32 (Buy Out) Plan, Executive Pension Plan (EPP), Small Self Administered Scheme (SSAS) or any form of Occupational pension.

**Pension Information**

Name of scheme/provider \_\_\_\_\_

Address \_\_\_\_\_

Suburb/Town \_\_\_\_\_

City \_\_\_\_\_

Policy / Ref. No(s) \_\_\_\_\_

Last known value \_\_\_\_\_

If you have more than one scheme / plan please provide details for each contract

**Life assurance / Protection & Investment Information**

Name of scheme/provider \_\_\_\_\_

Address \_\_\_\_\_

Suburb/Town \_\_\_\_\_

City \_\_\_\_\_

Policy / Ref. No(s) \_\_\_\_\_

Last known value \_\_\_\_\_

If you have more than one scheme / plan please provide details for each contract