

Please complete the following sections with as much information as possible.
It is important you complete the details marked with a cross (X) where indicated to allow us to start your review.

Title	Full name X
Previous name (if applicable)	
Date of birth 01 01 1970 X 	
Address X	Previous addresses (if applicable)
National Insurance number X 	
Preferred contact number X 	
Email address	

I/We have appointed **Sutton Brook Wealth Management of In-Partnership** as my/our Financial Advisers. Please accept this letter of authority to provide **Sutton Brook Wealth Management** with any information they may request from you with regards to my/our business, investment, insurance, banking, mortgage, pension or any other financial arrangements.

I would be grateful if this information could be sent to Sutton Brook Wealth Management by either email: info@suttonbrookwm.co.uk or by fax: 08455 442 659.

I/We do not confirm transfer of advising and servicing advisers to **Sutton Brook Wealth Management**, just plan information for the below plans..

Pension provider, company or scheme name <small>Eg. Scottish Widows, Aegon, ReAssure, Zurich, L&G, etc</small>	Policy numbers
X	
X	
X	
X	

I understand and accept that in order for a pension review to be completed, Sutton Brook Wealth Management may need to share my personal details with pension providers mentioned above, and I agree to such disclosure of personal data.

Signature X	Date X
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Sutton Wealth Management Ltd is an appointed representative of The On-Line Partnership Limited trading as In Partnership which is authorised and regulated by the Financial Conduct Authority

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