

# Your client's application form – the key to releasing funds fast

## Factsheet

FOR FINANCIAL INTERMEDIARIES ONLY. NOT APPROVED FOR USE WITH CUSTOMERS.

Just Retirement Limited will ensure your clients' annuity funds are released as quickly as possible, with efficient processes and a pro-active approach to case management.

The following provides a useful checklist of the information we need to do this, and the key stages in the process.

Items to send to Just Retirement	
<p><b>Application Form</b></p>	<p><b>Quote Number</b> Ask your client for the quote number they wish to accept. This is important as it will determine the type of ancillary benefits, such as dependant's pension or escalation, set up with the annuity.</p> <p><b>Medical Details Form</b> Ensure all medical and lifestyle questions are answered accurately, and as fully as possible, including occupation, postcode and the names of any medications being taken.</p> <p><b>Medical Declaration</b> The medical declaration must be signed and dated by your client and dependant (if dependant's pension applies), and include their doctor's full name and address.</p> <p><b>Money Laundering Declaration</b> This is needed for sources from Executive Pension Plans (EPP) and Small Self Administered Schemes (SSAS) only.</p>
<p><b>Key Information</b></p>	<p>Please ensure that all sections of the application form are completed in full, paying special attention to the <b>'Supporting Information'</b> and <b>'Details of your current pension funds'</b> sections.</p> <p>If a dependant's pension is required please make sure full details are included with the application, including the <b>dependant's National Insurance Number</b>.</p> <p>Please supply any additional documents such as court orders, powers of attorney and transitional protection certificates.</p>
<p><b>Evidence of age and name</b></p>	<p>You must provide us with evidence of age and name for your client and their dependant (if dependant's pension applies), either:</p> <ul style="list-style-type: none"> <li>• A copy of their passport(s)</li> <li>• <b>OR</b> A copy of a photo card driving license or a copy of the old style driving license that shows the client's date of birth</li> <li>• <b>OR</b> A completed ABI age verification form</li> <li>• <b>OR</b> Their original birth certificates, and, if appropriate, marriage certificate/civil partnership registration and deed poll certificate</li> </ul>

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### Securing the annuity rate

Returning the application within the quotation guarantee period will extend the rate up to the date shown on the top of the quotation. Please note the final rate is only secured by receipt of the funds from the ceding provider.

### Items to send to the ceding provider

- Please forward our Transfer and Open Market Option form, signed by your client, to each of the ceding provider(s).
  - This will give Just Retirement authority to discuss the client's policy with the ceding scheme.
- Please ask the ceding provider to provide written transfer information, together with the funds as soon as possible.
- Please note obtaining these funds is often the slowest part of the process, so be sure to return the form as soon as possible.

### What we will do

- Acknowledge receipt of the application
- Return any original birth and marriage certificates or civil partnership registration to you by Recorded Delivery
- Contact you with any outstanding requirements, should there be any
- Contact the relevant doctor(s) for confirmation of medical conditions
- Regularly chase the ceding scheme for the funds on your behalf if required
- Keep you informed of progress

### How to contact Just Retirement

Just Retirement is keen to offer you all the help and support you need.

If you'd like more information or assistance with quotations, for example, please contact our dedicated IFA Sales Support team on one of the numbers shown below.

**IFA Sales Support Tel:** 0845 302 2287

Lines are open Monday – Friday, 8.30am to 5.30pm.

**IFA Sales Support Fax:** 0845 301 2287

Alternatively you can email us: [ifasupport@justretirement.com](mailto:ifasupport@justretirement.com)

Or, log onto our website for further information [www.justadviser.com](http://www.justadviser.com)

We can help you get more money for your customers, quickly and easily.

**Thank you for placing your client with Just Retirement.**

**We value your custom and look forward to doing business with you in the future.**

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