

# Collins Actuaries

Actuaries to the Legal Profession

## INFORMATION SHEET

### CLIENT DETAILS

Name	<input type="text"/>	Date of Birth	<input type="text"/>
National Insurance No.	<input type="text"/>	Pension Scheme Reference No.	<input type="text"/>
Solicitor's Name	<input type="text"/>		
Solicitor's Firm	<input type="text"/>		
DX / Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		

### SPOUSE'S DETAILS

Spouse's Name	<input type="text"/>	Date of Birth	<input type="text"/>
National Insurance No.	<input type="text"/>	Pension Scheme Reference No.	<input type="text"/>
Spouse's Solicitor's Name	<input type="text"/>		
Spouse's Solicitor's Firm	<input type="text"/>		
DX / Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		

### DIVORCE DETAILS

Date of Marriage	<input type="text"/>	Date of Separation	<input type="text"/>
Current State of Divorce Action	<input type="text"/>		
Is this a Joint Instruction?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Name and Ages of children	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		

### LETTERS OF AUTHORITY

Please supply the following. Enclose any information available regarding either party's pensions that you have. If you do not have any details, please complete an employment history. (See over).

- 1 Letters of Authority from client to all employers/ pension providers.
- 2 Letters of Authority from spouse to all employers/ pension providers.
- 3 Letter of Authority from client to Inland Revenue.
- 4 Letter of Authority from spouse to Inland Revenue.

### CHECK LIST

Please answer Yes or No to the following questions. If the answer to any is Yes, please give details overleaf.

- a) Is either your client or your client's spouse currently in receipt of a pension?
- b) Has either party ever been bankrupt?
- c) Does either party have an Attachment (Earmarking) order against him/ her?
- d) Is either party a higher rate taxpayer?
- e) Is either party in ill-health?