[Your name]

[Address line 1]

[Address line 2]

[Address line 3]

[Postcode]

18 February 2015

[Company]

[Address line 1]

[Address line 2]

[Address line 3]

[Address line 4]

[Postcode]

Dear Sir / Madam

**Name:** [Your name, and any previous names]

**Date of birth:** [xx/xx/xxxx]

**National insurance number:** [Your NI number]

**Plan number:** [Your plan number]

**Plan start date:** [xx/xx/xxxx]

I was a member of the [employer name] scheme from [xx/xx/xx] to [xx/xx/xx].

I would be grateful if you could let me know:

* The current value of my plan and my plan’s transfer value at [xx/xx/xxxx]
* The contributions that have been paid into my plan since inception
* The projected pension and tax-free cash pay-outs if I take my benefits at [retirement age]
* Any charges I could incur, for instance, for transferring to another pension provider
* Whether any bonuses, rewards or Guaranteed Annuity Rates are available with my plan, and the relevant conditions
* Which funds I’m currently invested in
* Whether I can switch funds, what choices I might have and what charges would apply
* Whether death benefits apply to my plan and who they are payable to
* How do I nominate a beneficiary for death benefits if any apply?
* Whether I can access my plan online and how to register for this

In addition to the above, please can you update your records to reflect my up-to-date contact details and ensure that any correspondence, including my annual statements are sent here:

Address: [as above / full address if different to above]

Telephone number: [home 00000 123 123 / mobile 00000 123 123]

Email address: [Your email address]

If there is anything else you need, do let me know.

Your sincerely,

[Your signature]

[Your name]