



WHITE SWAN

Wealth Management

Head Office address:

2-4 Chequers Road, Basingstoke, RG21 7PU

Mobile: 07557 239911

Office no: 0208 241 3144

Name of Provider:

Dear Sir/Madam

Letter of Authority & Request for Details of Existing Plan

Policyholder Name:

Policy type:

Policyholder Address:

.....

Date of Birth: **Policy No:**

National Insurance No:

I would appreciate the information as soon as possible. The client has provided me with authority to request this information now, and for any more information I may need on this plan in future. (See below).

Yours faithfully

Andreas Moench, ACII, FPFS

Chartered Financial Adviser,

Rosemount Wealth Management is a trading style of Rosemount Financial Solutions Ltd who are an appointed representative of Quilter Financial Services. Quilter Financial Services is a holding company, subsidiaries of which are authorised and regulated by the Financial Conduct Authority.

FCA number: 448935

Please send information to : **82 Whitton Road ,Twickenham , Middx TW1 1BS**

Telephone : 07557 239911

Client Authority:

.....

(Client Signature)

Date ____/____/____



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