

Letter of authority template

Your personal details

Title (Mr/Mrs/Miss/Ms)

Date of birth

Address

Forename(s)

Surname

Postcode

Email address

National Insurance number

Customer number

This letter of authority gives People's Partnership permission to release information about your accounts / policies to a third party, such as a relative or an adviser. Examples of what it can and can't be used for are below:

☒ requesting policy information

☒ requesting transfer form

☒ requesting statements

☐ authorising transfers

☐ authorising disinvestment

☐ switching investments

Dear Sir/Madam,

Please accept this letter as my authority to release information to:

Third party's name

Company name

Address

Postcode

Accounts / policies that the authority applies to (if left blank, authority applies to all People's Partnership accounts / policies held by you):

(eg The People's Pension)

I understand that this letter of authority will be valid indefinitely, unless a new letter of authority is in place or an end date is stated below. I understand that I'm responsible for informing People's Partnership of any change to authority.

End date of authority (if applicable)

DD / MM / YYYY

Full name (Block capitals)

Signature

Date

DD / MM / YYYY