

List of Retirement Contracts (EXAMPLE ONLY)



Blackstone Moregate
Independent Financial Advisors

Schedule of retirement contracts. Prepared for J Smith.

Mr Smith											
Provider	Contract type	Status	Contract no.	Start date	Review date	Ref date	Contracted out	Regular cont.	Total single conts.	Total invested	Valuation
Scottish Equitable	Personal Pension	In force	SCOX0123456	05/04/02		31/12/24			£99,840	£99,840	£111,153
SIPP Centre	Self Invested Personal Pension	In force	SIPX0123456	08/09/06		31/12/34			£464,985	£464,985	£427,240
Scottish Life	Executive Pension	In force	SCTX0123456	02/02/95		31/12/24			£50,000	£50,000	£105,264
Scottish Widows	Stakeholder Pension	In force	SCTWX0123456	05/04/02		31/12/24			£16,695	£16,695	£19,085
Employer	FURBS	In force	Employer	01/02/01		31/12/24					£49,536
Total for Mr Smith									£631,520	£631,520	£712,277