

# INVESTMENT PROVIDER INFORMATION REQUEST

Dear Sirs,

**Investment Name:** .....

**Investment Reference:** .....

**FSCS Reference:** .....

I / we are making a claim for compensation to the Financial Services Compensation Scheme. So that I / we may submit the claim I / we need certain information. Please can you send me / us the following:

1. Confirmation of the original selling agent, their address and their SIB/FSA/FCA number.
2. Full transaction history showing the original amount and date invested, any further amounts invested, charges taken and any withdrawals, income or interest paid.
3. Current value of the investment, or actual value received from the investment if applicable.
4. A copy of the original application form.

**Please take this as my/our authority to release any additional information about my / our policy to the Financial Services Compensation Scheme at a future date.**

I / we look forward to hearing from you as soon as possible.

Yours faithfully

*Name(s):* .....

*Address(s):* .....  
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.....  
.....

*Signature(s):* .....

*Date:* .....



**ORIGINAL INVESTMENT INFORMATION REQUEST**  
*(WHERE ADVISED TO SURRENDER OR CASH IN AN EXISTING INVESTMENT)*

Dear Sirs,

**Investment Name:** .....

**Investment Reference:** .....

**FSCS Reference:** .....

I / we are making a claim for compensation to the Financial Services Compensation Scheme. So that I / we may submit the claim I / we need certain information. Please can you send me / us the following:

1. Confirmation of the type of investment or product.
2. The settlement or surrender value paid and the date of payment.

**Please take this as my/our authority to release any additional information about my / our policy to the Financial Services Compensation Scheme at a future date.**

I / we look forward to hearing from you as soon as possible.

Yours faithfully

*Name(s):* .....  
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*Address(s):* .....  
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*Signature(s):* .....  
.....

*Date:* .....  
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# MORTGAGE PROVIDER INFORMATION REQUEST

Dear Sirs,

**Mortgage Reference:** .....

**FSCS Reference:** .....

I / we are making a claim for compensation to the Financial Services Compensation Scheme. So that I / we may submit the claim I / we need certain information. Please can you send me / us the following:

1. Confirmation of the original selling agent, their address and their SIB/FSA/FCA number.
2. Mortgage Offer Document, showing;
  - i. Start date
  - ii. Rates applied
  - iii. Amount borrowed
  - iv. Term.
3. Annual Mortgage Statements, showing;
  - i. Payments and dates made
  - ii. Changes to interest rates
  - iii. Details of any further borrowing

**Please take this as my/our authority to release any additional information about my / our mortgage to the Financial Services Compensation Scheme at a future date.**

I / we look forward to hearing from you as soon as possible.

Yours faithfully

*Name(s):* .....

*Address(s):* .....  
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*Signature(s):* .....

*Date:* .....