

SAMPLE LETTER OF INSTRUCTION

Actuaries for Lawyers
DX 16818 Wetherby

Dear Sirs

Loss of Pension Rights / Loss of Earnings – Mr X

Mr X the claimant has suffered a loss of pension rights in the ABC pension scheme together with a loss of earnings as the result of [incurring an injury whilst / being dismissed from his employment with employer Y] on [date 1]. [We act for Mr X / the defendants who are []].

The [defendants in the case are [] / claimant is Mr X in this case] and [they are / he is] represented by XYZ solicitors.

You are instructed as a [party expert / single joint expert] to prepare a report to advise on [the loss of pension rights / the loss of earnings / the loss of pension rights and the loss of earnings].

Your report [is required for negotiation purposes only and does not need to be CPR Part 35 complaint / may need to be considered by the court/tribunal and therefore needs to be CPR Part 35 compliant].

In order to assist you in your calculations the following information is enclosed.

- a) Chronology of events from just before the loss event occurred up until the present time.
- b) Benefit statement from the ABC pension scheme outlining Mr X's pension benefits in the scheme at the date that he left service with his employer.
- c) Details of pension and lump sum benefits that Mr X has received from the ABC Scheme since the loss event occurred.
- d) Copy of a pension scheme booklet in relation to the ABC pension scheme
- e) Copy of Mr X's payslips in the 12 month period leading up to the loss event.
- f) Copy of possible promotion scenarios that Mr X might have achieved in his employment had the loss event not occurred.
- g) [Details of subsequent employment that Mr X has managed to obtain since the loss event occurred including payslips, terms of engagement letter and details of pension benefits offered by his new employer] or [Mr X has not worked since the loss event occurred. You should assume for the purpose of your calculations that he will obtain employment in Z months time at an annual salary of £Q per annum or you should assume that Mr X will now be unable to secure future employment given the nature of his injuries].

h) Other documents which we believe will be relevant to consider for the purpose of your calculations

Your report needs be filed by [date 2] and the next court /tribunal date is scheduled to be on [date 3].

Prior to carrying out any work on this case we would be grateful if you could confirm that preparation of such a report is within your area of expertise and that you can meet the above timescales for completion of the report. We also require confirmation of the fees that you would charge to prepare such a report in order that these can be approved by [ourselves / both instructing parties].

Yours sincerely

Firm of solicitors