

## MoneyHelper Guidance - Supplemental Form

You **must** complete this form where the application form does **not** include the MoneyHelper guidance section and you intend to do any of the following:

- Designate all or part of your fund into drawdown
- Withdraw all or part of your fund via UFPLS
- Transfer Out and access your pension savings in the next 3 months
- Transfer In and access your pension savings in the next 3 months

Failure to complete this form may result in a delay as we cannot proceed with your request until we have confirmed with you that you have received regulated financial advice, or guidance from MoneyHelper or opted out of receiving guidance. **Please return your completed form to us by email or by post.**

### 1. Personal Details

**Existing plan reference number:**

**Title: MR/MRS/MISS/OTHER**

Please delete as appropriate or indicate other title.

**Surname:**

**Forename/s (in full):**

**Date of birth:**

**Permanent residential address including postcode:**

### 2. MoneyHelper Guidance

The Financial Conduct Authority (FCA) require us to tell you about a service called MoneyHelper.

MoneyHelper is a free, impartial service from the Government, which offers guidance to help you make an informed decision about what to do with your pension savings. This includes providing the different options available to you.

Pensions guidance is delivered at an appointment with an independent pensions specialist, which you can choose to book yourself, or alternatively Talbot and Muir can arrange this appointment on your behalf. You can also receive advice from a regulated financial adviser, you will expect to pay for their service.

Please ensure you have read the MoneyHelper privacy policy, which is available on their website, [www.moneyhelper.org.uk](http://www.moneyhelper.org.uk)

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Please tick **one** of the following:

- Option A  **I will book a free appointment with MoneyHelper myself.**  
Please go to option A below. Please note that we cannot proceed with your payment request until we have confirmed with you that you have attended your MoneyHelper appointment.
- Option B  **I would like Talbot and Muir to book a free appointment with MoneyHelper on my behalf.**  
Please go to option B below. Please note that we cannot proceed with your request until we have confirmed with you that you have attended your MoneyHelper appointment.
- Option C  **I wish to opt out because I have received advice from a regulated financial adviser.**  
*Please go to option C below.*
- Option D  **I wish to opt out because I have already received guidance from MoneyHelper.**  
*Please go to option D below.*
- Option E  **I wish to opt out without receiving guidance from MoneyHelper or advice from a regulated financial adviser.**  
*Please go to section 3.*

**Option A** If you have chosen to book an appointment with MoneyHelper, please go to [www.moneyhelper.org.uk](http://www.moneyhelper.org.uk). Alternatively, you can telephone MoneyHelper on 0800 138 3944. Please note that we cannot proceed with your drawdown request until we have confirmed with you that you have received regulated financial advice, or guidance from MoneyHelper.

**Please confirm the date of your appointment with MoneyHelper below.**

We will contact you after the date of your appointment to check you have attended the appointment and received guidance.

**Option B** Please confirm some suitable dates and times below to enable Talbot and Muir to book your free MoneyHelper appointment. Alternatively, if you wish for us to telephone you to discuss a suitable appointment time, please confirm below:

Please confirm your email address below. MoneyHelper will send you confirmation of your appointment by email.

Please confirm the phone number you wish MoneyHelper to call you on.

Please provide us with a memorable word. A MoneyHelper pension specialist will repeat this word so you will know it is them when they call you.

Please provide details below if you require additional support to help you access an appointment, e.g. accessibility adjustments.

Please tick this box to confirm that you authorise Talbot and Muir to share the above details with MoneyHelper as part of booking your appointment.

Please confirm if you consent to MoneyHelper sharing your contact details with their trusted research partner, Ipsos MORI. Ipsos MORI may contact you to ask if you would like to provide feedback and you can decide then if you want to take part.

Yes

No

Talbot and Muir will send you confirmation with details of your appointment, if we book this for you. We will also contact you after the date of your appointment to check you have attended the appointment and received guidance.

**Option C** If you have already received advice from a regulated financial adviser, please provide details below of who gave you advice below:

|   |                      |   |                      |
|---|----------------------|---|----------------------|
| Name of authorised individual                                 | <input type="text"/> |   |                      |
| Full name of regulated organisation                           | <input type="text"/> |   |                      |
| Financial Services Register reference number for organisation | <input type="text"/> | Financial Services Register reference number for individual | <input type="text"/> |
| Date you received advice                                      | <input type="text"/> |   |                      |

**Option D** If you have already received guidance from MoneyHelper, please confirm your booking reference below.

Please confirm the date of your appointment with MoneyHelper below.

Please note: if you have selected options B, C, D or E, you may still benefit from receiving guidance, if your personal circumstances or the value of your pension fund has changed significantly.

### 3. MoneyHelper Guidance and Declaration & Signature

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Declaration

- I declare that to the best of my knowledge and belief the statements made in all sections of this MoneyHelper guidance form (whether in my handwriting or not) are correct and complete.
- I authorise Talbot and Muir to provide the details in section 2 to MoneyHelper.

If you experience difficulties accessing any our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your express consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us and other to continue to meet your needs. Please could you kindly provide this below.

I agree to my information being processed by Talbot and Muir Ltd, to include being shared and gathered between relevant third parties.

Please refer to our Privacy Notice, should you requires further guidance on how we collect and protect your personal information. This can be found on our website [www.talbotmuir.co.uk](http://www.talbotmuir.co.uk) or please ask you adviser or us for a copy.

Your consent to share information is voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent please contact our Admin Department on 0115 841 500 or via email at [customer.support@talbotmuir.co.uk](mailto:customer.support@talbotmuir.co.uk)

Signed:

Member name:

Date:

**talbotandmuir**

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Talbot and Muir Limited provides administration to Small Self Administered Pension Schemes and is authorised by and regulated by the Financial Conduct Authority to provide administration to Self Invested Personal Pensions.

Talbot and Muir is the trading name for Talbot and Muir Limited (company number 02869547), registered in England, registered address Dunn's House, St Paul's Road, Salisbury, SP2 7BF. A list of directors is available upon request.

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