talbotandmuir

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 FCA requires us to tell you about a service called MoneyHelper.

MoneyHelper guidance.

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, in order to access your pension savings. 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 on your behalf. You can also receive advice from a regulated financial adviser. Advisers may charge you for their services.

Please ensure you have read the MoneyHelper privacy policy, which is available on their website, www.moneyhelper.org.uk/en/about-us/privacy-notice.

You can book online at www.moneyhelper.org.uk/pension-wise or call MoneyHelper on 0800 138 3944. Alternatively call us using the contact details on the last page and we'll book an appointment for you.

Please note that we are unable to arrange appointments with MoneyHelper for anyone below the age of 50 so these appointments would need to be arranged by you directly.

Regulated financial advice.

Before making a decision about taking your pension benefits you should also get advice from a financial adviser. If you don't have a financial adviser, you can visit https://www.moneyhelper.org.uk/choosing-a-financial-adviser to find one.

The regulations require you to confirm the following options before we can proceed with your application.

If you plan to take guidance and/or advice you should do this before completing this form.

Have you received guidance from MoneyHelper relating to this transaction in the last 12 months?

☐ Yes Date guidance received

☐ No

If you do not want to use MoneyHelper you need to opt-out. Please tick the relevant option below.

I've received regulated financial advice related to this transaction within the last 12 months ☐

Date advice received:

I don't want guidance from MoneyHelper or regulated financial advice from an adviser. ☐

If you've already received guidance or regulated financial advice, you may want to do this again if there's been any significant change to your pension fund or personal circumstances.

3. MoneyHelper Guidance and Declaration & Signature

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 require further guidance on how we collect and protect your personal information. This can be found on our website https://nucleusfinancial.com 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

Signed:

Member name: Date:

We are able to provide literature in alternative formats. For a Braille, large print, audio or E-text version of this document call us on 0115 841 5000 (or via the Typetalk service on 18001 0115 841 5000).

55 Maid Marian Way, Nottingham, NG1 6GE | t. 0115 841 5000 | f. 0115 841 5027 | e. enquiries@talbotmuir.co.uk | w. www.talbotmuir.co.uk

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