

Third party advice declaration

Confirmation of transfer advice

How to fill in this form:

- Please use black ink to complete the form.
- Write clearly inside the boxes, using CAPITALS and leaving spaces (where appropriate).
- **PLEASE COMPLETE ALL SECTIONS OF THIS FORM.** Not doing so will delay the application.
- If you have any queries about this form, please contact us on 0800 902 902.

What happens next?

Please send the completed application form to:

**Fidelity
PO Box 391
Tadworth
KT20 9FU**

This form must be completed by you, as the adviser who has provided positive advice to transfer into a flexible pension arrangement from one of the following type of arrangements:

- **Final salary (defined benefits) scheme.**
- **Pension(s) with safeguarded benefits.**
- **Pension(s) with any guaranteed benefits.**

Name of client

National insurance number

Name of pension scheme to be transferred from

Policy/reference number

Name of adviser

FCA individual reference number (IRN)

Firm name

FCA firm reference number (FRN)

Declaration

I can confirm as the adviser to the above customer that I have:

- provided advice which is specific to the type of transaction proposed by the member or survivor;
- permission under Part 4A of the Financial Services and Markets Act 2000, or resulting from any other provision of that Act, to carry on the regulated activity in article 53E of the Regulated Activities Order;
- provided advice to the above named client to recommend they transfer their benefits in the above named pension scheme to an arrangement providing flexible benefits, as it is in their best interests.

Adviser signature



Adviser stamp (if available)

Date signed

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

(DDMMYYYY)