

MoneyHelper guidance form

You must complete this form to accompany any drawdown designations, UFPLS requests, annuity purchase requests, uncrystallised transfer in or transfer out requests, where the application form does not include a MoneyHelper guidance section.

Please note that we cannot proceed with your request until we have confirmed with you that you've received regulated financial advice, or guidance from MoneyHelper or opted out of receiving guidance. Failure to complete this form may result in delays processing your request.

For all requests for Your Future SIPP, MasterSIPP, SmartSIPP, SimSIPP and Suffolk Life SIPP, please return your completed form to us by secure message or by post to Curtis Banks, 153 Princes Street, Ipswich, Suffolk, IP1 1QJ.

For all requests for Curtis Banks SIPP products including Zurich SIPP and transfers out, please return your completed form to us by secure message or by post to Curtis Banks, 3 Temple Quay, Bristol, BS1 6DZ.

1 Accessing our services

If you experience difficulties accessing any of 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 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 others to continue to meet your needs. Please could you kindly provide this below.

I agree to my information being processed by Nucleus Financial Platforms Group, to include being shared and gathered between relevant third parties.

Please refer to our Group Privacy Notice, should you require further guidance on how we collect use and protect your personal information. This can be found at www.nucleusfinancial.com/privacy-notice or please ask your adviser or us for a copy.

Your consent to share personal information is entirely 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 us on the below:

For Your Future SIPP, MasterSIPP, SmartSIPP, SimSIPP and Suffolk Life SIPP the SIPP Support Team on 0370 414 7000 or sippsupportteam@curtisbanks.co.uk.
For all other Curtis Banks SIPP products the Client Management Team on 0370 414 7000 or cmt@curtisbanks.co.uk.

2 Your details

Name

Scheme name (if applicable)

Plan number(s)

3 MoneyHelper guidance

The 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, 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 Curtis Banks 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

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 request until we have confirmed with you that you've attended your MoneyHelper appointment.

Option B

I would like Curtis Banks 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've attended your MoneyHelper appointment. Please also 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.

3 MoneyHelper guidance (continued)

- 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 4.](#)

Option A

If you have chosen to book an appointment with MoneyHelper, please go to www.moneyhelper.org.uk. Alternatively, you can telephone MoneyHelper on 0800 138 3944. Please note that we cannot proceed with your request until we have confirmed with you that you've 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 to enable Curtis Banks to book your free MoneyHelper appointment below. 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 when they call so you know it's them.

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

Please tick this box to confirm that you authorise Curtis Banks 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 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

[Curtis Banks 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 of who gave you advice below:

Date you received advice

Name of authorised individual

Full name of regulated organisation

Financial Services Register reference
number for organisation

Financial Services Register
reference number for individual

3 MoneyHelper guidance (continued)

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.

4 MoneyHelper guidance 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 Curtis Banks to provide the details in section 2 to MoneyHelper.

Name of client

Signature of client

Date

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0370 414 7000, or via the Typetalk service on 18001 0370 414 7000.

Curtis Banks Limited,
3 Temple Quay,
Bristol, BS1 6DZ

T 0370 414 7000
F 0370 414 8000

curtisbanks.co.uk

Curtis Banks,
153 Princes Street,
Ipswich, IP1 1QJ

T 0370 414 7000
F 0370 414 8000

Call charges will vary. We may record and monitor calls.

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