



ReAssure

Confirmation of financial advice

You are required to provide us with written evidence that you've given your customers regulated financial advice if:

- their pension policy contains a safeguarded benefit,
- the value of this policy amounts to £30,000 or more (or the value needed to support the guarantee is £30,000 or more) and,
- they are looking to transfer their benefits or carry out an option that uses the pensions flexibility rules introduced on 6 April 2015.

Please complete this form as evidence that you've given financial advice to our member. Please ensure all sections are completed and the form is correctly signed and dated.

Customer's full name:	<input type="text"/>
Customer's ReAssure policy number:	<input type="text"/>
Name of ReAssure scheme:	<input type="text"/>
Date advice given:	<input type="text"/>
Financial Adviser's company name:	<input type="text"/>
Adviser name:	<input type="text"/>
Financial Adviser's company address:	<input type="text"/>
Postcode:	<input type="text"/>
Email address:	<input type="text"/>
Contact number:	<input type="text"/>
Financial Services Register number:	<input type="text"/>

Declaration: By signing below you are confirming that you have given advice about the proposed option, to the named customer on the policy numbered above and that you have the relevant FCA permissions to carry out this activity under article 53E of the Financial Services & Markets Act 2000 (Regulated Activities) Order 2001.

Adviser signature:	<input type="text"/>
Date:	<input type="text"/>

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