

PENSION WISE – APPOINTMENT OPT OUT FORM

HARGREAVES
LANSDOWN

If you don't want an appointment with Pension Wise, please complete this form and return it by email or post.

Please be aware that we need to receive your completed opt out form before we can send out an application.

Your details

Full name:

Date of
birth:

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Home address:

What you need to know

- What you do with your pension is an important decision. It's important that you understand your options and check your chosen option is right for your circumstances. Take advice or guidance if you're unsure.
- **Pension Wise** is a government service from **MoneyHelper** that offers free, impartial pensions guidance about your defined contribution pension options.
- An appointment with Pension Wise is free and will help you understand what your overall financial situation will be when you retire.
- If you choose to opt out of an appointment, you can still contact Pension Wise at a later date if you change your mind. You can find more information online at www.moneyhelper.org.uk/nudge-public or by calling **0800 100 166**.

Declaration

I declare that

- Hargreaves Lansdown has offered to book me a free appointment with Pension Wise.
- I haven't received any personal advice from Hargreaves Lansdown on my options and will ask about advice if I'm unsure.
- I understand my pension options and am happy to proceed without Pension Wise guidance.

Signature:



Date:

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Please email the completed form to retire@hl.co.uk.

You can also send it by post to Freepost: HARGREAVES LANSDOWN (no stamp needed),
though please be aware that this method may take longer.