

The Options Workplace Pension Trust

Retirement Guidance Confirmation/Opt-Out Form

Please use this form to indicate your decision on receiving guidance prior to accessing your retirement benefits.

We will require this form to be completed and returned before we can proceed to issue you with a Retirement Benefit Request form.

Please send your completed form to Options Corporate Pensions UK Ltd, 1st Floor Lakeside House, Shirwell Crescent, Furzton, Milton Keynes, MK4 1GA, or email a scanned copy to us at OWPT@optionspensions.co.uk.

1.	Member details	
	Full Name:	
In	National Insurance No:	Date of Birth: Day Month Year
Ple	ease complete one of the following options by ticking the appro	opriate box:
2.	. Pension Wise Retirement Guidance	
	I confirm I have attended a Pension Wise Retirement Guidance appointm	nent within the last 12 months.
	Date of Appointment: Day Month Year	
3.	. Independent Financial Advice	
	I have received Independent Financial Advice regarding my Retirement C	Options
Ple	ease give details of the Financial Adviser who provided you with	n pensions advice.
	Name of Adviser/ Representative's Company:	
Firm	ms' FCA registration Number:	
	Address for Adviser/ Representative Firm:	
	Date of Advice: Month Year	
4.	. Opting out of Guidance	
	I have declined the offer of Pension Wise Guidance or Independent Finan I acknowledge that any decision I make regarding my Retirement Opti understanding of the options available.	
Ple	ease Sign and Date Below	
Men	ember's Signature: D	Date: Day Month Year
	⑤) ODTIONS™ PART OF STM GROUP PLC	FOR MORE INFORMATION PLEASE CONTACT

Options UK Personal Pensions LLP, company no. OC345142, Options Corporate Pensions UK Limited, company Options UK Personal Pensions LLP, company no. 0C345142, Options Corporate Pensions UK Limited, company no. 09358998, Options EBC Limited, company no 12484808 and Options SSAS Limited, company number 01230550. Options UK Personal Pensions LLP is authorised and regulated by the Financial Conduct Authority, FRN 501747. Options Corporate Pensions UK Ltd is regulated by The Pensions Regulator. All Options UK companies are registered in England and Wales: 1st Floor Lakeside House, Shirwell Crescent, Furzton Lake, Milton Keynes, Buckinghamshire, MK41GA

for your tomorrow

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DH05/22@Options Page 1 of 1