

**EVIDENCE OF APPROPRIATE INDEPENDENT ADVICE
FOR SAFEGUARDED BENEFITS OVER £30,000**

Policy number/s _____

Your policy contains safeguarded benefits with a total value of more than £30,000, so we are required by law to make sure you have received Appropriate Independent Advice before we can pay your claim.

You will need to take financial advice from an adviser who is authorised by the Financial Conduct Authority, and has the appropriate permission to advise on safeguarded benefits.

TO BE COMPLETED BY YOUR FINANCIAL ADVISER **MANDATORY**

Adviser's name	
Contact address	
Telephone number(s)	
Email address	
Individual registration number	
Full Company name	
FCA firm reference number	

As the Financial Adviser advising on this business, I can confirm that I have the appropriate FCA permissions to undertake this regulated activity, and I have advised the policyholder specifically about this application.

How was the advice provided? Face to face At distance

Signature Date

Print name

Please add your company stamp here