

CONFIRMATION OF GUIDANCE OR ADVICE

1 Policy number(s)

2 Name

Please tick to tell us about any guidance or advice you have received and sign and date below:

1) I have attended a Pension Wise appointment

Date of appointment

D	D	M	M	Y	Y	Y	Y
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2) I have received guidance or advice from a regulated financial adviser

If you have received guidance or advice from a regulated financial adviser, please provide details below:

Firm name

FCA company reference

3) I have opted out of attending a Pension Wise appointment

SIGNATURE

Print full name

Date

D	D	M	M	Y	Y	Y	Y
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REST ASSURED

Calls may be recorded for training or monitoring purposes.

Contact us at: Walton Street, Aylesbury, Bucks, HP21 7QW Tel : 0330 159 1530 Fax : 0845 835 5765 : www.utmost.co.uk

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