



Pension Wise Guidance form

You can find more information online at btpensions.co.uk or contact us by email at csu@railpen.com

Member name:
Member reference:

If you want to take your pension benefits from your defined contribution pension (this includes any benefits you may have in BRASS or AVC Extra), you will need to let us know that you have taken guidance from Pension Wise, that you wish to opt out or that you meet a requirement that exempts you from taking the guidance. **We cannot proceed with your application otherwise.**

Pension Wise is a government service that provides free and impartial guidance about the options available to people with defined contribution pensions. You can book a Pension Wise appointment if you are aged 50 or over and have a defined contribution pension (this includes any benefits you may have in BRASS or AVC Extra).

We strongly recommend you get guidance from Pension Wise. If you are eligible and choose not to obtain this guidance, you will need to confirm to us that you want to opt out of receiving it.

Please complete and return this form to confirm whether you have taken guidance or want to opt out.

You can book an appointment online at www.moneyhelper.org.uk/en/pensions-and-retirement/pension-wise/book-a-free-pension-wise-appointment or by calling 0800 100 166.

Alternatively, we can book an appointment with Pension Wise on your behalf. If you would like us to do so, please let us know.

Member declaration:

*Please select **one** option*

I confirm I have attended an appointment and received appropriate pension guidance from Pension Wise on the retirement options available to me in connection with this application.

I confirm that I have been referred to appropriate pensions guidance but am declining the recommendation to attend a Pension Wise appointment. Please accept this as confirmation that I am opting out of receiving that guidance.

I am not required to attend a Pension Wise appointment as I am under age 50.

I am not required to attend a Pension Wise appointment as this application involves no BRASS contributions and I do not intend to make any BRASS contributions before I take my pension benefits.

I can confirm that the information provided is true to the best of my knowledge

Signature:	<input type="text"/>
Date signed:	<input type="text" value="D D"/> / <input type="text" value="M M"/> / <input type="text" value="Y Y Y Y"/>