



# Paul Wallis Financial Solutions Limited

Independent Financial Advisers

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## Pension Transfer Advice Request Form

Please tick the boxes and provide further information below before signing the request form and returning it to us.

- I confirm that I have read and understood the information contained in the booklet "A General Guide to Defined Benefit and Defined Contribution Pension Schemes"
- I confirm that I have read and understood the information contained in the booklet "A Guide to the DB Pension Transfer Advice Process"
- I confirm that I have read the Consumer Guide to the Pension Transfer Gold Standard
- I would like to investigate further the possibility of a transfer of benefits to a defined contribution pension scheme for the following reasons;

I would like to arrange an appointment with an adviser to discuss this in more detail and with a view to requesting a Pension Transfer Analysis report. I understand that I will be charged a fee for this report even if the recommendation is to stay with my existing pension scheme.

Name	
Address	
Telephone	
Email	
Signature	
Date	

Registered in England and Wales No. 07299070

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