

3

Facilitated adviser charge details

Amount of facilitated adviser charge:

£

Please note that the charge must be shown in pounds, not as a percentage.

Please tick ONE of the following to indicate what the advice you received was in relation to:

 A single one-off contribution into your pension amounting to*

£

 A transfer into your pension from another pension provider for*

£

 An application for income drawdown Something else (for example, investment advice to switch or redirect funds)

* These options are not available for the WorkSave Buy-Out Plan

4

Member declaration

I would like you to pay the facilitated adviser charge as detailed in Part 3 of this form to my adviser's firm named in Part 2 of this form.

I acknowledge that the facilitated adviser charge will be taken from my pension pot in line with the method set out in the **Facilitated Adviser Charge Guide** which can be accessed at legalandgeneral.com/adviserchargeguide

I acknowledge and accept that:

- If my pension contributions are invested in a 'default arrangement' within a qualifying workplace pension scheme, the payment of the adviser charge will not affect my eligibility to become or remain a member of the scheme nor the ability for contributions to continue to be invested in that default arrangement.
- The amount of adviser charge may be higher than any maximum level of charge that the government imposes on default arrangements held within qualifying workplace pension schemes.

The adviser charge represents a full or partial payment in respect of a genuinely commercial arrangement between myself and the adviser named in Part 2 of this form relating to advice I have been given in respect of the pension plan number specified in Part 1 of this form.

Member's signature

Signature

X

We can't accept this form unless it is signed by both the member and the adviser.

Date

D D M M Y Y Y Y

5

Adviser declaration

I confirm that I am the member's adviser and that the member has agreed to the payment of the facilitated adviser charge detailed above to:

Name of adviser's firm

I confirm that the above facilitated adviser charge is solely in relation to advice on this pension plan specified in Part 1 and meets HM Revenue & Customs requirements for authorised payments.

Adviser's signature

Signature

X

Date

D D M M Y Y Y Y


legalandgeneral.com/workplacebenefits

Legal & General Assurance Society Limited

Registered in England and Wales No. 00166055

We are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Legal & General (Portfolio Management Services) Limited

Registered in England and Wales No. 02457525

We are authorised and regulated by the Financial Conduct Authority.

Registered office (for both companies): One Coleman Street, London EC2R 5AA.

Q0055132 12/17 SUB191217

