



Lisa Welton &lt;lisa@retirement.capital&gt;

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**Fwd: Pension Safeguarding Guidance Appointment**

1 message

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**Nicola Steele** <nicolarsteele@gmail.com>  
To: Lisa Welton <lisa@retirement.capital>

21 September 2023 at 10:05

Lisa,

A further appointment has been made.

Nicola

----- Forwarded message -----

From: **Pension Safeguarding Guidance Bookings** <psg@moneyhelper.org.uk>  
Date: Wed, Sep 20, 2023 at 4:05 PM  
Subject: Pension Safeguarding Guidance Appointment  
To: <nicolarsteele@gmail.com>

**We've booked your appointment**

Dear Nicola,

Thank you for booking a Pension Safeguarding Guidance appointment.

Date:

**3 October 2023**

Time:

**1:30pm (BST)**

Appointment lasts:

**45 to 60 minutes**

Your phone number:

**07766275320**

Memorable word:

**M\*\*\*\*\*s**

Reference number:

**820365**

A trained guidance specialist will call you on the number above. They'll repeat the memorable word so you know you're speaking to MoneyHelper.

Our team are here to help you, please treat them with respect. If you are verbally abusive toward them, they have the right to end the call and you may have to rebook.

**If you miss the call, you'll need to book another appointment.**

Call **0800 015 4906** to change or cancel your booking.

## Road Safety

In the interest of road safety we will not deliver a an appointment if you are driving. This also includes the use of hands-free devices. Please ensure you are not driving at the time of your appointment.

## Preparing for your appointment

To make the most of your appointment it would be helpful if you know:

- details of your current pension and provider
- details of the pension scheme you are looking to transfer to
- details of where the receiving pension scheme proposes to invest your money
- any information you have from the current provider for the Red or Amber flags raised by them
- details of your other pension arrangements you may have

Think about your financial circumstances in general and plans for retirement, eg:

- sources of income like salary, state benefits, savings and investments
- when are you likely to want to access the pension savings

## What's MoneyHelper?

MoneyHelper is a government backed organisation that provides free and impartial guidance on your money and pensions. Our service is designed to support you in making your own informed decisions based on your circumstances. Further information can be found at [moneyhelper.org.uk/about-us](https://moneyhelper.org.uk/about-us).

We don't give legal or regulated financial advice or recommend specific financial products because we aren't regulated or authorised by the Financial Conduct Authority to do so. This means we can't tell you what the best option is for you, or what to do with your money or pension. If you're looking for personalised money or pensions advice or specific product recommendations, you'll need to see a regulated financial adviser or seek legal advice.

MoneyHelper collects and stores personal data for the purpose of delivering pensions guidance. Full details of our privacy policy, including information on your rights in

relation to the data we hold can be found at [moneyhelper.org.uk/privacy](https://moneyhelper.org.uk/privacy).

Find out more about when and how to get professional advice in our guide 'Do you need a financial adviser': [moneyhelper.org.uk/en/getting-help-and-advice/financial-advisers/do-you-need-a-financial-adviser](https://moneyhelper.org.uk/en/getting-help-and-advice/financial-advisers/do-you-need-a-financial-adviser).

If you need legal advice, you can find a solicitor on the Law Society website: [lawsociety.org.uk](https://lawsociety.org.uk).

A service from

