



Retirement Solutions

Adviser charge declaration form

You'll need to complete this declaration form before Royal London will deduct the adviser charges which you have agreed with members of a Retirement Solutions group pension plan with Royal London.

1 Financial adviser's details

Please complete this section with your details.

Name of adviser firm	<input type="text"/>
FCA reference number	<input type="text"/>
Royal London agency number	<input type="text"/>
Contact telephone number	<input type="text"/>
Contact email address	<input type="text"/>

2 Plan details

Please complete this section with the details of the group pension plan.

Name of the group pension plan	<input type="text"/>
Name of the sponsoring employer	<input type="text"/>
Group pension plan number (existing group plans only)	<input type="text"/>

3 Your declaration

Please read and sign this section.

I confirm that the adviser firm named in section 1 of this form is the financial adviser for the group pension plan detailed in section 2 and that:

- all adviser charges to be deducted from an individual member's plan which is held under the group pension plan, will specifically relate to advice and/or services which the adviser firm has provided directly to that member;
- where adviser charges have been agreed with an individual member, the adviser firm has confirmed directly to that member that the payment of the agreed adviser charge is not a condition of them joining or continuing to be a member of the group pension plan;
- the provision of generic pensions information by the adviser firm to the members will not be subject to an adviser charge payment;
- all adviser charges that the adviser firm agrees with the members will be detailed within the member's individual client agreements and copies of those agreements will be made available to Royal London on request; and
- where the adviser firm is also providing advice and/or services to the sponsoring employer, that will not be subject to any charge payable by members of the group pension plan, but will be covered by a separate fee paid by the sponsoring employer.

Signed	<input type="text"/>	Name	<input type="text"/>
Position	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>

For, and on behalf of, the adviser firm



Royal London
royallondon.com

We're happy to provide your documents in a different format, such as braille, large print or audio, just ask us when you get in touch.

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