

Date _____

Please reply to _____

Dear _____

Your case has been forwarded to me to deal with and is receiving attention. I will be in touch with you once I have considered it.

During my investigations I may need to contact the appropriate employer(s), trustees, managers or insurers of your pension arrangement(s). I will need your permission to do this. To avoid any delay please complete, sign and return the form below.

Yours sincerely _____

Adviser _____

Form of authority

Case No _____

Name (please print) _____ Date of birth _____

Address _____

_____ Postcode _____

Telephone No _____ National Insurance No _____

Email address _____

Data Protection Act 1998

In order to help you we need to keep a record of your case, which may contain sensitive personal data. The law says we must get your consent to do this. Everything you tell us will be treated confidentially and will only be used for the purpose of resolving your complaint.

Sensitive personal data is defined as information relating to any of the following: racial or ethnic origin, political opinion, religious beliefs, trade union membership, health, sexuality or sex life, offences and/or convictions.

I give my consent to The Pensions Advisory Service recording sensitive personal information about me.

To whom it may concern

I confirm that I have asked The Pensions Advisory Service for advice and assistance regarding my private pension(s). I therefore authorise the trustees, employers, managers, insurers or any other interested party of any pension arrangement of which I may be, or have been, a member to release to them any information or documents to which I may be entitled. If required, I authorise The Pensions Advisory Service to submit a complaint under the Internal Dispute Resolution Procedure.

Signed _____ Date _____

How did you hear about The Pensions Advisory Service? _____