



Dear representatives,

here's the latest update from FSCS on what you need to know.

Regards,

FSCS Team

Pension Pilot Application Form Changes from Monday 19th July 2021

You may have noticed we have been piloting some changes to improve our pension application form which is in use for all pension claims made against the following 7 firms:

- Grosvenor Butterworth (Financial Services) Limited – 152754
- Consumer Wealth Limited - 667910
- Henderson Carter Associates Limited – 512016
- Asset Independent Financial Advisors Limited t/a Asset IFA, Asset Independent Mortgages, Home Estate – 139062
- Economic Financial Solutions IFA Limited t/a Torch Wealth Management, JAG Protection -592076
- Financial Page Limited (FRN:623858)
- Multicorp Rose (FRN: 197540)

We're making minor tweaks to improve the overall wording of the form, and to assist with future routing of claims to the appropriate team to work as soon as possible. The below three changes will go **live from Monday 19th July**, however we think this will have minimal impact as it is information you already gather when speaking to the customer.

This is something that will eventually be rolled out to ALL pension claims but we will keep you updated as to when this will happen.

Another thing to note is in the near future and before the below changes are rolled out to all pension applications we will be making national insurance (NI) numbers a mandatory requirement on ALL pension application forms. We will keep you updated on when this will go live.

We're adding the following questions and supporting document requirements

Claim overview tab

Are you claiming about a pension you had with your current (or previous) employer? Y/N

Claim details tab

Your circumstances at the time of advice section

Has your address changed since you received the advice? Y/N

If 'Y' to above question - [What was your address when you received the advice?](#)

Supporting documents tab

Currently we ask you to provide "Proof the Firm gave you the advice" as mandatory, but now you'll also need to provide:

Full transaction history from the start of the current pension plan

Valuation statement for current pension plan

Financial Services Compensation Scheme

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