# This communication is for employers only. It mustn’t be distributed, or relied on by members.

# Transfer pack heads up – sample email copy: TargetPlan contract-based schemes only

To help you communicate your new Aegon workplace pension to your employees, we’ve produced this sample copy for you to use. If you adapt or remove elements of this text, we can’t be held responsible
for any consequences arising from doing so.

We’ve taken all reasonable care to make sure the information it contains is accurate at the time
we’ve issued it, but we don’t accept liability for any consequences resulting from its use.

There are certain rules you must follow when promoting your company pension scheme to your employees. You can find out more about these in the [**regulator’s guidance for employers.**](https://www.thepensionsregulator.gov.uk/en/trustees/managing-dc-benefits/6-communicating-and-reporting#770dd16eb8fa45d39551dd238c2c751a)

If you’re not sure if it’s suitable for your purposes, please get in touch with your financial adviser.

Please note this copy should only be used for TargetPlan contract based schemes and not
trust based schemes.

# Your pension transfer options

Hello <Name>,

You’re all set with your Aegon workplace pension. Have you thought about what to do with the pension pot you’ve already built up in the <previous pension scheme name>? You have the following options to choose from:

Option 1: Leave it with the current provider.

Option 2: Transfer it to another pension provider.

Option 3: Transfer it to Aegon and combine it with your new workplace pension.

Aegon, your new workplace pension provider, will shortly be sending you a pension Transfer Pack,
so please watch out for this in the coming weeks. It contains information on how you can combine
your pension pot already built up in the <previous pension scheme name> scheme, with your new
Aegon workplace pension – should you wish to.

Transferring your pension pot already built up in the <previous pension scheme name> may not be the best option for you. You may lose valuable features, protections, guarantees or other benefits - so make sure you compare products before transferring. It’s up to you to decide if this is the right decision for you. If you’re not sure, speak to a financial adviser - there may be a charge for this.

**As your employer, we aren’t authorised or regulated to give you advice or recommendations on what you should do. For general information about pension transfers you can visit** [Money Helper](https://www.moneyhelper.org.uk/en) **or, as an Aegon customer, Aegon Assist is also on hand to help.**

****Aegon Assist are a free, friendly, UK-based team of trained specialists who can give you general guidance in plain English to help you make your own decisions.

**Call Aegon Assist on <insert your scheme specific number>. Phone lines are open 9am - 4pm, Monday - Friday Call charges will vary.**

Aegon Assist don’t provide advice. If you need advice on whether transferring is right for your circumstances, you should speak to a financial adviser. If you don't have a financial adviser, you
can visit [moneyhelper.org.uk/choosing-a-financial-adviser](https://www.moneyhelper.org.uk/choosing-a-financial-adviser) to find the right one for you. There may be a charge for advice.