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

# Transfer pack reminder – 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.

# Have you received your pension transfer pack?

Hello <Name>,

You should have received a pension transfer pack from our new workplace pension provider, Aegon.   
It contains information on how you can combine your pension pot already built up in the <previous pension scheme name>, with your new Aegon workplace pension – should you wish to.

Just as a reminder, you have three options for what you can do with the pension pot you’ve built   
up in the <previous pension scheme name>.

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.

If you’re looking to transfer - you should be comfortable with the investment decisions you make as   
you may lose valuable features, protections, guarantees or other benefits when you transfer. 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.

It’s important to remember the value of your consolidated pension pot can still fall as well as rise and isn’t guaranteed. The final value of your pension pot when you come to take benefits may be less   
than has been paid in.

Any new funds you move your money into will have their own set of risks that will be detailed in the   
fund information that is available to you.

If you would like to transfer your existing pension pot with your new Aegon workplace pension,   
complete and return the transfer pack to Aegon by <date>.

**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 on hand to help.**

**A picture containing text, sign

Description automatically generated**They’re 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.**

As Aegon Assist don’t provide advice and if you’re not sure if transferring is right for your circumstances you should speak to a financial adviser.