Pension transfer alert communication

**Sample email copy for employers – pension transfer alert communication**

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 cannot be held responsible for any consequences arising from doing so.

We’ve taken all reasonable care to make sure the information is accurate at the time of issue, 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 on [The Pension Regulator’s website](https://www.thepensionsregulator.gov.uk/en/employers/managing-a-scheme/communicating-with-your-scheme-members).

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

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**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>? The options exist even if you haven’t yet considered.

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, are sending you a pension Transfer Pack. 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.

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: [moneyhelper.org.uk/en/pensions-and-retirement](https://www.moneyhelper.org.uk/en/pensions-and-retirement)

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 0345 603 0509. Call charges will vary.

As 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 - there may be a charge for this. 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.

<sign off>