

Pension Sharing Report disclaimer

Important note

This is a suggested disclaimer for clients that do not wish to instruct an analysis of their pensions in order to determine how they should be shared on divorce. It has been produced by Bluesky Chartered Financial Planners who are not legally qualified and we are aware that it will not cover every eventuality. Legal advice should be taken before using this letter to ensure that it is appropriate for the matter in hand. – Delete this note when reproducing.

Client

Name

Address

RE Case Name

Reference

I confirm that I have been advised by my solicitor that I should obtain a pensions expert report in relation to how our pension assets should be shared as part of our divorce settlement.

I confirm that the transfer value(s) and pension entitlement(s) of my and my spouse's pension(s) have been obtained and seen by me.

I expressly confirm that I do not wish to obtain a pension expert report in relation to our pension funds and how they should be dealt with following our divorce.

I entirely accept that without a pension expert report any guidance from my solicitor and decisions made by me regarding how the financial assets should be treated following our divorce may result in an unequal and unfair division of assets.

I am aware that my solicitor is not authorised to provide me with Regulated financial advice and has not done so. I understand that specific advice regarding our pensions is a Regulated activity.

I confirm that the instructions to my solicitor not to obtain a pension expert report are pursuant to my own free will and I have not been placed under any pressure or undue influence, and that I am not in any way under duress.

I accept and agree that no liability will attach to my solicitors as a consequence of any direct or indirect or consequential, financial loss and/or other prejudice financial or otherwise I may suffer as a consequence of me not obtaining a pension expert report.

I accept that the loss to me of not instructing a pension expert report could run into many thousands of pounds either immediately or over the course of my retirement.

Signed

A B Smith

Date
