

IFG PENSIONS LIMITED

TERMS OF BUSINESS

Listed below are the key items we require financial advisers to provide and comply with, in order to onboard clients.

IFG Pensions Limited will require a copy of the following before any transaction is accepted:

- Introducer's licence.
- Copy of Introducer's complaints procedure.
- Confirmation of Professional Indemnity (PI) insurance held by the Introducer.
- A copy of the relevant qualifications held by the Introducer.

Introducer's Undertakings and Responsibilities

- The firm will assist IFG Pensions Limited with its Compliance with due diligence and anti-money laundering obligations.
- The firm will disclose to the client the policy terms and conditions and fees.
- The firm will disclose to the client any fees it is charging and of any that the firm will receive from third party companies.
- The firm confirms it is authorised by its regulator to advise on pension products.
- The firm agrees to deliver in a timely manner all communications and documents relating to their Scheme membership received from IFG Pensions Limited.
- If at any time the firm ceases to be authorised by its regulator, it will notify IFG Pensions Limited immediately.
- The firm shall not claim to be associated to IFG Pensions Limited or represent it without written permission.
- Each of the parties agree not to disclose confidential information without consent.

Termination

- The relationship may be terminated immediately by either party giving written notice.

General Data Protection Regulations

Each party shall comply with all applicable data protection and privacy legislation enforced in the United Kingdom including the General Data Protection Regulation (EU) (2016/679) and the Data Protection Act 2018.

IFG Pensions Limited may utilise the services of its associated companies to collate information and documentation relating to clients who will be required to consent to their personal information and data being supplied to associated companies for such purposes and to third parties in connection with investments or, if and when necessary or required, for regulatory purposes.

A copy of our privacy policy can be found at www.ifglpensions.com/privacy.