

Complaints about personal and occupational pensions

Before we can process your application you must complete all relevant sections of this form and provide the information requested.

1. Your details

| | | | | | |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|----------------------|-------|----------------------|
| Surname | <input type="text"/> | First name | <input type="text"/> | Title | <input type="text"/> |
| Address | <input type="text"/> | | | | |
| | <input type="text"/> | Postcode | <input type="text"/> | | |
| Date of birth | <input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | Telephone | <input type="text"/> | | |
| Email address (if you have one) | <input type="text"/> | | | | |

2. Representative details

If you are appointing someone to represent you please include their details here.
(please note if someone is representing you we will only correspond with them).

| | | | |
|----------|----------------------|-----------|----------------------|
| Name | <input type="text"/> | | |
| Address | <input type="text"/> | | |
| Postcode | <input type="text"/> | Telephone | <input type="text"/> |
| Email | <input type="text"/> | | |

3. Communication preferences

How would you, or your representative, prefer to be contacted?

| | | |
|--------------------------------|---------------------------------|------------------------------------|
| <input type="checkbox"/> Email | <input type="checkbox"/> Letter | <input type="checkbox"/> Telephone |
|--------------------------------|---------------------------------|------------------------------------|

Do you need information in another language or format? ☐ Yes ☐ No

| | | | |
|----------------------------------|--------------------------------------|-------------------------------------|----------------------------|
| <input type="checkbox"/> Braille | <input type="checkbox"/> Large print | <input type="checkbox"/> Translator | Other <input type="text"/> |
| (please specify) | | | |

Do you have any other communication needs we can help with? ☐ Yes ☐ No

If yes, give details.

4. Previous referrals

Has your complaint been considered by a tribunal, court or another Ombudsman? Or is it in the process of being considered? ☐ Yes ☐ No

If yes, give details.

Have you previously referred your complaint to The Pensions Advisory Service?

☐ Yes ☐ No

If yes, can we request your papers from them?

☐ Yes ☐ No

What is your Pensions Advisory Service reference number?

Have you brought a complaint to us before?

☐ Yes ☐ No

5. How did you find out about us? (please select one)

☐ Recommendation from a friend or colleague

☐ Referral from The Pensions Advisory Service

☐ Referral from the Financial Ombudsman Service

☐ Employer

☐ Pension scheme administrator, manager or trustee

☐ Pension scheme booklet

☐ Internet search

Other (please specify)

6. About your complaint

Please tell us the name of your pension scheme or pension provider. If you have a policy number, please include it here.

Please give us the name and address of each party you think is at fault. Your complaint can be about more than one party.

Employer:

Trustee:

Standard Life Trustee Company

Scheme Manager:

Scheme Administrator:

When did you first become aware of this problem?

Please tell us what went wrong and who you think is at fault.

See attached notice

Please tell us what personal or financial loss you have suffered.

Standard Life have been remunerated at a cost of £1000 per year to include the retention of a pensioner trustee as a statutory requirement, wherein no statutory requirement was required post 5 April 2006. This amounts to £12,000.

Personal time away from work of 5 to 6 hours per week of time spent trying to sort this out for the best part of 6 months. 25 weeks that's 150 hours at £500 per hour. This amounts to £75,000

Compensation for the health problem this caused. This amounts to £50,000.

Missed investment opportunities in IOTA crypto it was at \$0.22, I bought at \$0.22, had a high of \$5.50 so take a middle ground of \$2.40 per coin. Investing 15k at 0.22 and selling at the mid point that 11x return \$165k approx. This amounts to £125,000.

Total 12k+75k+50K+125k = £262,000

How would you like the matter put right?

I require compensation payment from Standard Life.

7. Supporting information

To process your application we need a copy of the final response you received from the parties you are complaining about as well as any other documents relevant to your application. If you are not sure which documents to include with your application form you can contact us for advice free of charge on 0800 917 4487.

8. Declaration

I consent to The Pensions Ombudsman obtaining necessary information to deal with my complaint from other bodies, including the other parties to my complaint. I confirm that I have read and understood the personal information policy (see below).

Signed

Date

Keep a copy of this form for your records and send the completed form along with any supporting documentation to: The Pensions Ombudsman, 10 South Colonnade, Canary Wharf, London E14 4PU.

Personal Information Policy

Under the Data Protection Act 1998 we must comply with various duties for any personal information that we hold about you. For example we must use your information fairly, and keep it safely and securely.

What is personal information? By “personal information”, we mean information that is about identifiable living individuals. Your complaint will include a considerable amount of information about you, such as your name, age, workplace or former workplace, and possibly your financial affairs and medical history. When we investigate your complaint you or others will probably give us additional information about you.

How we use personal information We use this information to help us reach a decision about your complaint, and we may need to share information with any individuals or organisations that are involved in dealing with your pension. By law, we also have the power to share information about your complaint with a small number of other organisations, if we think it necessary in helping them carry out their own functions, but we will always consider this carefully before doing so.

Publishing Ombudsman decisions We aim to carry out our work openly and transparently and for this reason we usually publish Ombudsman determinations, as well as some opinions made by our adjudicators, on our website. While our published decisions will usually have identifying personal information removed, relevant information about you will remain in order to explain what decision has been reached and why.

For more information visit www.pensions-ombudsman.org.uk