

FAQs and useful forms

Please find the form or question you are looking for below.

- **[Direct Debit](#)**
- **[Lost Policy](#)**
- **[GAP Switch Authority](#)**
- **[Fund Switch Authority Form](#)**
- **[Full/partial surrender - Request form](#)**
- **[Adviser Fee Change Form OneSIPP TPP](#)**
- **[Adviser Fee Change Form Portal ISA - GIA & PP](#)**
- **[Adviser Fee Change Form SP Bond](#)**
- **[SIP Nomination of beneficiary](#)**
- **[Funds Choice Guide Current](#)**
- **[Funds Choice Guide Closed](#)**
- **[Funds Choice Guide Historical](#)**

FAQs

How do I get a valuation?

Please contact our Client Contact Team on 01179 266 366 or on **clientservices@sanlam.co.uk**

How do I change my address?

If you are a Sanlam Investment and Pensions client the you can contact our Client Services Team on 01179 266 366 or on **clientservices@sanlam.co.uk**

If you are a Sanlam Private Wealth client then we request this request by post, please can you sent a written instruction to our Bristol office.

How do I get Financial Advice?

If you would like to contact a financial adviser you can locate an adviser near you through the Money Advice Service Directory which is located on their **[website < https://www.moneyadviceservice.org.uk/en/articles/choosing-a-financial-adviser>](https://www.moneyadviceservice.org.uk/en/articles/choosing-a-financial-adviser)**.

Contact us on 0117 975 2338 to speak to Sanlam Wealth Planning – who can provide Financial Advice whether face to face or on the phone all over the U.K.

How do I take my Pension benefits?

In the first instance please contact our Client Contact Team on 01179 266 366.

What are the costs for either my Portal Pension or OneSIPP?

The Charges for both products can be found on our website by following the below links:

[OneSIPP < https://www.sanlam.co.uk/document-repository/onesipp/1087-onesipp-guide-to-charges>](https://www.sanlam.co.uk/document-repository/onesipp/1087-onesipp-guide-to-charges)

[Portal Pension < https://www.sanlam.co.uk/document-repository/portal-products/1203-sanlam-portal-charges-and-minima-grid>](https://www.sanlam.co.uk/document-repository/portal-products/1203-sanlam-portal-charges-and-minima-grid)

Please be aware that there might be further charges applied with regard to fees being taken by your financial adviser and for the underlying assets held.

How do I amend my payments in or out?

Please contact our Client Contact team on 01179 266 366, they will be able to confirm if this is possible and assist you with how to do this.

How do I check and amend my nominated pension beneficiary?

If you would like to check your nominated beneficiaries please contact our Client Contact Team on 01179 266 366

To update your nomination of beneficiaries please complete and post in a new **[nomination of beneficiary form < https://www.sanlam.co.uk/document-repository/onesipp/1020-sip-nomination-of-beneficiary>](https://www.sanlam.co.uk/document-repository/onesipp/1020-sip-nomination-of-beneficiary)**.

Where can I find your fund choice guides?

Our fund choice guides can be found above, if you would like to switch the funds you are invested in please complete our **[fund switch authority form < https://www.sanlam.co.uk/document-repository/useful-forms/1026-fund-switch-authority-form>](https://www.sanlam.co.uk/document-repository/useful-forms/1026-fund-switch-authority-form)**.

How do I defer my pension benefits?

Please contact our Client Contact Team on 01179 266 366 or email **clientservices@sanlam.co.uk** and let us know.