



## Checklist #11 : Promoting the Pension Transfer Gold Standard

The Personal Finance Society has launched a voluntary code of good practice for safeguarded and defined benefit (DB) pension advice. Any financial advice firm can adopt the Gold Standard regardless of the accrediting body they are affiliated to.

**Visit here** to learn more about the code. If you subsequently decide to apply, you can do so **here**.

Once accepted you can then use this checklist to promote the code.

1

### Add the Gold Standard logo to your website's homepage

Once you've adopted the code you can use the Gold Standard logo. Don't forget to add it to your website in a prominent position so that potential clients can spot it right away.

Done



To do



Not for us



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### Add the logo to other relevant pages

If your website has a 'Why us' (or similar) explaining the reasons why a client should work with you, this should be updated with your membership of the code. Furthermore, the logo should also be added to any pages that discuss defined benefit (DB) or final salary advice.

Done



To do



Not for us



3

### Explain more about the code

Create a new page on your website, or add text to a suitable existing page, explaining more about the code: What is it? How does your business comply? Why have you signed up? How will it benefit consumers and clients? Wherever this logo appears on your website, it should be linked to this page.

Done



To do



Not for us



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### Promote the 'Consumer Guide to the Gold Standard'

This is the last of the code's nine principles. Include a link to the guide when you explain more about the code. Make sure the guide opens in a separate window, to ensure the website visitor can easily navigate back to your website once they have finished reading the guide.

Done



To do



Not for us



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### Update your stationery

Add the Gold Standard logo to your your business card, letterheads and other branded stationery.

Done



To do



Not for us



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### Don't forget your email footers

Your email footer is seen by countless people every day, including existing and potential clients. Add the Gold Standard logo and link it to the page on your website explaining how the code works.

Done



To do



Not for us



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### Update your social media profiles

Add the logo and an explanation about the code to your social media profiles.

Done



To do



Not for us



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### Update your directory profiles

For many firms, AdviserBook, Unbiased and VouchedFor are important sources of new business. If your profiles note that you give advice on DB schemes update the text to explain that you have signed up to the code, what it is and how it benefits consumers.

You can also get creative with the images used on the directories to incorporate the Gold Standard logo. Feel free to get in touch if you need help with this.

Done



To do



Not for us



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### Write and promote a blog on the topic

Once you receive confirmation that you've successfully adopted the code, write a blog or news article explaining more. Include why you are happy to have adopted the code, why you support it, what it means for consumers and how it will help to improve outcomes.

Add the piece to your website then send it to clients, prospects and professional connections via your newsletter and promote it on social media.

Done



To do



Not for us



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### Record a video

Consider turning the blog into a short script and record a video, either professionally or using your mobile phone.

The short film could then be added to your website, promoted on your social media channels and sent to potential clients after they've got in touch (see 12, below).

Done



To do



Not for us



11

### Update your guides

If you produce a guide to Defined Benefit (DB) / Final Salary pensions, as many firms who are active in this market do, add the logo in a prominent position along with an explanation of the key points.

Done



To do



Not for us



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### Tell potential clients

When a potential client initially makes contact they will probably explain that they want to discuss their DB pension. In your pre-meeting correspondence it'll do no harm to explain to them you have signed up to the code.

Direct them to the page you created after following checklist point 3. Alternatively, you could create a document explaining the code, why and how you adhere to it, and how it

benefits them. This is another good opportunity to promote the 'Consumer Guide to the Gold Standard' published by the PFS.

Done



To do



Not for us



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### Write a press release

Pension transfers are regularly in the news, but regrettably all too often for the wrong reasons.

To set yourself apart, consider writing a press release to send to local publications promoting the code and the fact you've voluntarily signed up.

Done



To do



Not for us



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### Communicate internally

As this is a new code it's unlikely many of your staff will know the details. So, it's vital you train them on the key points so they can answer confidently if they are asked about it. Make sure your team can explain what the code is, why you've signed up, what you had to do to be accepted and how it benefits consumers. From potential clients to mystery shoppers, you never know who might ask!

Done



To do



Not for us



### We hope you found this useful

If you sign up to the code why wouldn't you want to promote it effectively? If you would like our assistance or have any questions, please don't hesitate to get in touch.

Our digital, design and content team will be only too happy to help. They can be reached on **0115 8965 300** or by emailing [info@theyardstickagency.co.uk](mailto:info@theyardstickagency.co.uk)

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