



Scottish Friendly - Member Transition Comms

Artefact: Email copy - initial notification
Product: Section 32
Investment strategy: All

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Email subject line:

PLEASE READ: Important information about your Fidelity workplace pension

Dear <<name>>

This important information applies to your <<full workplace pension scheme name>> – please read it to ensure you understand what is happening.

We have agreed to transfer some of the pensions we manage over to Scottish Friendly, including your <<full pension name>>, which we plan to transfer on **30 September 2026**. There are more details about this transfer in our [consumer guide](#), which we encourage you to read so you fully understand the transfer.

Scottish Friendly are a leading UK life and investments organisation. They have been around since 1862 and now look after more than £4.2 billion for over 853,000 individuals and organisations (as of 1 May 2025). We selected Scottish Friendly because of their track record of carefully looking after retirement savings over the long term.

What this means for your pension

Your pension savings remain safe and secure. This transfer will mean Scottish Friendly will look after your pension savings for you. You will keep the same investments, with the same fees and the transfer will not cost you anything. There will also be no changes to how the policy works.

You don't have to do anything for your pension to be moved to Scottish Friendly. We will arrange it all for you and Scottish Friendly will get in touch to confirm when the process is complete.

The transfer process

This transfer is subject to a legal process and must be approved by the High Court. It also needs to be approved by Scottish Friendly's Delegates, who represent their members. This vote is scheduled for 29 April 2026. You have the right to object to the transfer with the High Court and there is time for you to do this if you want to. We explain how this works below.

Three points to keep in mind

- ***If you haven't updated your contact details recently***, please check they are still correct. You can do this by logging in to [PlanViewer](#) or calling us on **0800 058 4448** or **(+44) 1737 838 585** (if calling outside of the UK) before the transfer starts.

- ***If anyone has an interest in your pension*** (for example, if a pension sharing order is in place), please make sure you share all this information with them.
- ***You have the right to object to this transfer*** if you feel you may be adversely affected by it. We explain how this works in our [consumer guide](#). If you want to object, contact us by:
 - Emailing: remediation.team@fil.com
 - Calling: **0800 368 6804**
 - Writing to: WI BIM, Beech Gate, Millfield Lane, Tadworth, Surrey, KT20 6RP

We will pass objections on to our regulators, the independent expert and the High Court. We will present all objections to the High Court in writing; however, you may attend the hearing in person if you wish to make representations directly to the Court. The final High Court hearing is expected to be held on 8 September 2026 at Rolls Building, 7 Rolls Buildings, Fetter Lane, London, EC4A 1NL.

Finding out more

There's more information about this transfer in our [consumer guide](#), including details of how to contact us if you would like more information. We also have a dedicated website at retirement.fidelity.co.uk/fil-transfer-to-scottish-friendly/ where you can get key dates and information about the process, as well as reading and downloading all the documents relating to the transfer.

Yours sincerely

Your Fidelity Team

You may have heard that Scottish Friendly is planning to merge its business with OneFamily. When this was announced, we had already agreed to transfer your pension to Scottish Friendly. The proposed merger will take place after your pension has been transferred. We have spoken with Scottish Friendly and they have assured us that there will be no changes to the terms and conditions of your pension plan as a result of the merger. You can find out more about it in our [consumer guide](#).