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Planning

Provision of Financial Guidance Services

Cabinet Office

F01: Prior information notice

Prior information only

Notice identifier: 2025/S 000-038332

Procurement identifier (OCID): ocds-h6vhtk-055b5a

Published 8 July 2025, 3:46pm

Section I: Contracting authority

I.1) Name and addresses

Cabinet Office

70 Whitehall

London

SW1A2AS

Email

professionalservices@cabinetoffice.gov.uk

Country

United Kingdom

Region code

UKI32 - Westminster

Justification for not providing organisation identifier

Not on any register

Internet address(es)

Main address

<http://www.gov.uk/government/organisations/cabinet-office>

I.3) Communication

Additional information can be obtained from the above-mentioned address

I.4) Type of the contracting authority

Ministry or any other national or federal authority

I.5) Main activity

Economic and financial affairs

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Provision of Financial Guidance Services

II.1.2) Main CPV code

- 66000000 - Financial and insurance services

II.1.3) Type of contract

Services

II.1.4) Short description

The purpose of this Prior Information Notice (PIN) is to notify all interested parties of the Government Departments' intention to undertake a procurement exercise for the delivery of a tailored financial guidance services to help individuals make informed decisions regarding the management of awarded funds.

II.1.5) Estimated total value

Value excluding VAT: £10,000,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.3) Place of performance

NUTS codes

- UK - United Kingdom

II.2.4) Description of the procurement

The service is intended for approximately up to 4,000 recipients.

Main Services Required

Supporting individuals to make an informed decision between lump sum or ongoing

payments, taking into consideration their individual personal and financial circumstances.

Key Participation Requirements

Expertise in delivering financial advice to individuals, taking into account their financial circumstances and objectives.

Evidence of compliance with regulatory standards, including valid financial adviser qualifications and safeguarding certifications. All firms providing this guidance should be registered and authorised by the Financial Conduct Authority.

A minimum of 50% of the advisers providing this guidance should hold a Level 6 Advanced Diploma in Financial Planning, with a minimum requirement for advisers providing this advice being a Level 4 Diploma in Regulated Financial Planning. All qualifications held should be regulated, RDR compliant qualifications.

Interested parties registered service offering available on the CCS Funds Administration and Disbursement Service RM6322 DPS Agreement.

Supplier ability to provide services in the UK (for the avoidance of doubt, England, Ireland, Scotland and Wales) both remotely and by exception face to face.

Proposed route to market

We are currently exploring the potential routes to market with CCS RM6322 DPS FAADS being one of the options we are keenly exploring.

Support in addressing safe money management practices, including fraud prevention and the importance of making a will.

Guidance on various matters, including options for managing funds.

The service delivery of this guidance would be as follows: information gathering regarding the individual's circumstances, providing a tailored financial advice session based on the awarded funds and their financial circumstances and financial priorities, followed by the provision of a written report summarising the guidance provided to the individual.

II.2.14) Additional information

Response

Interested parties who are able to meet the requirements are invited to respond to this engagement by emailing and confirming professionalservices@cabinetoffice.gov.uk.

Suppliers should include confirmation of their interest and capability to meet the Key Participation Requirements detailed in this PIN.

Suppliers to provide any other relevant information they believe would be useful to the authority as part of our assessing our commercial approach.

Suppliers are advised support may be available from CCS to assist interested parties in registering for the CCS DPS framework.

Suppliers are required to confirm once they have registered on to the DPS via CCS RM6322 FAADs.

The deadline to submit your response is 12:00 Noon, on 22nd July 2025.

All replies must clearly state both the supplier's interest, and the capability to offer the main services required and meet the key participation requirements.

This PIN exercise does not constitute a form of agreement or assurance from the Cabinet Office regarding the development of the procurement process.

II.3) Estimated date of publication of contract notice

3 November 2025

Section IV. Procedure

IV.1) Description

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

Section VI. Complementary information

VI.3) Additional information

Timeline and Next Steps

The Authority intends to launch their procurement during Summer 2025 and award the Contract Autumn/Winter 2025.

Terms and Conditions of the PIN

This PIN does not formally signify the beginning of a procurement and does not constitute a commitment by the Cabinet Office to undertake any procurement exercise.

This PIN is for information only and is not a call for competition. The Cabinet Office reserves the right not to enter a formal procurement process and not award contracts. Accordingly, the Cabinet Office will not be liable for any bid cost, expenditure, work or effort incurred by a provider in acting on the basis of this PIN.

All information included in this PIN is indicative and subject to change.